Gannett sets 'innovative' ad rates for 'USA Today'

By RICHARD L. GORDON

WASHINGTON—Gannett execs put the finishing touches last week on an ad rate strategy designed to fill the ad pages of its new national daily, *USA Today*, beginning with the first issues this fall.

Key execs, who are set to go public with their rate plan this week, disclosed details to ADVERTISING AGE, including eye-catching cpms, a "Partnership Plan" offering free space to charter advertisers and pricing innovations taken from the magazine field.

Advertisers will be offered a "unique" rate card with more advantageous rates for larger units, higher than usual discounts, lower than usual color premiums and no premiums for franchise positions (premium positions sold on a renewable basis).

It's also understood that *USA Today*, which claims it will be the only newspaper using satellite links to transmit color ad pages, is separately considering publishing a new prototype, sent via satellite, to demonstrate to advertisers the quality of its color reproduction. Existing prototype editions have been printed in Washington, but 1982-83 plans call for linking Washington via satellite to printing plants in Atlanta, Minneapolis-St. Paul and Pittsburgh, with ten more markets to be added in the first quarter of next year.

The pricing tactics encourage color ads and large-space ads, an approach that fits the magazine-like concept of the publication embraced by former *McCall's* advertising director Joseph P.R. Welty, now *USA Today's* vp-advertising. "We're going to be talking about it as newspaper in format and magazine in concept," he said in an interview. Gannett is "guaranteeing no more than 30% ad content per issue to control clutter," he noted, and the emphasis on color and larger ads is part of the publication's commitment to "exception-

(Continued on Page 76)

Another light night

Newspaper ad from Jos. Schlitz Brewing presents the new theme for revamped Schlitz Light: "New Schlitz Light! Stays light all night long" (AA, May 17). Tv spots are being produced. J. Walter Thompson USA, Chicago, handles.

'Marco' journeys up Nielsen chart

By JAMES P. FORKAN

(NBC affiliate meeting coverage on Page 70.)

NEW YORK—Procter & Gamble and NBC-TV went up in the Nielsen ratings on explorer Marco Polo's latest journey last week.

The start of the 10-hour, $25 million-plus "Marco Polo" miniseries coincided with the NBC affiliates convention in Los Angeles, and Robert Mulholland, NBC president, and Raymond Timothy, network president, delivered overnight rating updates on the first two instalments in the five Nielsen-metered markets to the affiliates' cheers.

When the finale's numbers arrived on Friday, NBC said it notched a 20.8/36. That, plus the 22.1/37 for Part I, 20.3/35 for Part II and 22/36 for Part III, gave "Marco Polo" a four-night average of 21.2 in homes ratings and 36 in audience share.

Although "Marco" did win all 20 half-hours, its final average score was not quite enough to best the season's top miniseries in rating, NBC's "World War III." But it did move ahead in share, 36 to 33.

The cheering must have been just as loud in Cincinnati, since the opening episode's rating and share were topped only by another P&G vehicle, the "Miss USA" pageant on CBS, which tied for first place in the Nielsen week ended May 16.#

Conditions call for change

CBS wants makegoods cut

By COLBY COATES

NEW YORK—CBS-TV Sales will push for the elimination of some audience guarantees in the upfront tv sales season, but just how hard is now being weighed by top-level CBS Broadcast Group management.

CBS is arguing that changing network tv conditions—a reference to such things as diminishing audiences and rising production costs—necessitates a move away from the practice of giving advertisers bonus points (makegoods) when its tv programs underdeliver the promised audience numbers.

The bottom line on it is rather elementary: At a time of rising costs, combined with top-heavy pressure to boost corporate profits (and underwrite costly and often losing ventures in the new technologies), the networks can rake in countless millions of additional dollars by selling inventory rather than giving it away as makegoods.

The fact that tightly-managed CBS has "flown the balloon" does not mean it will be the only network asking buyers to give up guarantees. In fact, all the networks cut their share of specific deals each year without the promise of making up for any audience deficiencies.

But what gives added significance to the current atmosphere is the networks' message that they'll offer various upfront deals at reduced prices if the buyer agrees not to demand audience assurances. And, further, bonus points could be available for certain benchmarks—numbers of households, for example—but not others, such as demographics. Said one network exec, "Obviously buyers will demand a pretty good discount."

At this point, before serious negotiations begin for next fall's tv season premieres, some agency buyers are curious about the non-guarantee idea; others, however, seem vehemently opposed. Generally, the rule of thumb in network tv sales is: When you buy guarantees you buy the network's share estimates; when you buy without them you buy the agency estimates.

Among the risks and rewards that CBS management must be considering is how tough a time it will have in selling the weak-sister shows on next fall's schedules. Explained one exec, "If the risk is in the agency's pocket the buyer is going to pick the stable programs, the ones that have a track record, or at least own an attractive time period. So, obviously, the packages

(Continued on Page 76)

highlights

Monday, May 24, 1982

Coca-Cola, soon to complete its buy of Columbia Pictures, is planning its most extensive promotion ever with Columbia's "Annie." *See Page 10.*

Young & Rubicam's Alex Kroll tells the American Assn. of Advertising Agencies to try for the "improving of advertising productivity." *See Page 12.*

Sony Corp. of America and Digital Equipment Co. are making belated entries into the microcomputer market. *See Page 28.*

The European edition of the *Wall Street Journal* probably will look like the U.S. version. *See Page 35.*

The 6-year-old *Asian Wall Street Journal* is about to turn its first profit. *See Page 50.*

A General Foods test with Wisconsin's Dick's Supermarkets shows that retailers can improve category profitability by using scanning data properly. *See Page 52.*

Mrs. America Pageant, now syndicated, is eyeing network and cable tv. *See Page 53.*

Ford is planning 33 new cars and trucks worldwide through 1985. *See Page 55.*

The widely accepted "bell jar curve concept" of product life cycles can be altered by advertising and marketing, the American Marketing Assn. was told. *See Page 56.*

Long-haul truckers are the target audience as a California-based truckstop ad network visits Madison Avenue. *See Page 57.*

NBC and its affiliates are convinced that the new fall lineup has a chance at making the network No. 2. *See Page 70.*

There's more stability in the ad business than most people think, says a Doyle Dane Bernbach executive. *See Page 72.*

Foote, Cone & Belding, apparently still interested in merger, did not mention that word to its stockhholders last week. *See Page 74.*

CORPORATE CLOSEUP

Eastman Kodak, with introduction of its disc camera system, is entering a new era of marketing aggressiveness, observers say. *See Page 4.*

INTERNATIONAL

Sweden's Bonnier publishing empire is being restructured into smaller units to stop the company's downward momentum. *See Page 36.*

Blood and gore mysteries are putting serious news programs in the back seat in Japan. *See Page 37.*

RETAILING

Britain's Marks & Spencer department store chain is expanding, bringing its unconventional ways of doing business to Canada. *See Page 58.*

"America the Beautiful," Bloomingdale's fall promotion theme, will offer appropriate specially made lines. *See Page 58.*

VIDEOTECH

ABC Video Enterprises is getting involved in each new electronic medium that emerges. *See Page 43.*

Tele-Communications Inc. is planning a national program package. *See Page 45.*

MAGAZINE

The Brothers Saatchi are taking the advertising community by storm with acquisitions, a growing list of new clients and management acumen. *See M-2.*

Price concessions do not a quality product make. In Parting Shot, Rance Crain says airlines and U.S. auto makers made errant decisions when weighing the price/value relationship. *See M-36.*

SPECIAL REPORT

In this week's Special Report —research business review— growth of the top 28 U.S. advertising/marketing/public opinion companies is tracked, with A.C. Nielsen accounting for 42% of total 1981 revenues. *See M-5.*

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GM holds to record ad pace

By RALPH GRAY

DETROIT—General Motors is continuing to invest in advertising at a record pace despite the long slump in car sales, stockholders were told at the company's annual meeting here Friday.

GM said it boosted U.S. ad expenditures 28.5% in 1981 to a total of $401 million, compared to $312 million in 1980. Chairman Roger Smith told stockholder advocate Lewis Gilbert, "I would probably look forward to some sort of increase" this year as well. Mr. Smith said rising ad rates and a highly competitive marketplace are responsible for the increases.

Worldwide ad spending in 1981 rose 7% to $633 million, the company said.

Mr. Smith also told shareholders that GM's 12.8% interest rate ceiling for auto loans has boosted the company's market share since it replaced rebates as the company's main promotional thrust. "We're very satisfied" with the rate program, he said.

No decision has been made on an extension past the May 31 deadline for the program. GM "may try

(Continued on Page 76)

Kroll to Four A's: Regain creative edge

By NANCY MILLMAN

WHITE SULPHUR SPRINGS, W. VA.—"Our goal is not some self-indulgent creative revival, but the improving of advertising productivity," Alex Kroll, president of Young & Rubicam/USA, told the final session of the American Assn. of Advertising Agencies here.

For the past year holding the additional title of chairman of the Four A's committee for the improvement of advertising, Mr. Kroll in his report harkened back to an address he made last summer about the exciting work being done by agencies outside the U.S.—notably tv by the British and Japanese, and print by the French. "Now that they are stealing our thunder, they may start stealing our business too," Mr. Kroll declared.

The committee for improving advertising is made up of creative people and concentrates on the creative product, Mr. Kroll said, because it is "the backbone" of the business. The serious reasons for bemoaning the loss of the creative edge by U.S. agencies: The "desperateness" that clients are voicing regarding their profit picture; new communications altering agencies' way of doing business; clients' productivity problems, and a "consumer that is dazed" from inflation, Reaganomics and communications choices.

One of the choices consumers are beginning to have is "the power of bipping"—the fast-forward and erase buttons on videocassette recorders that enable the viewer of tv programing and commercials to "go bip—and gone," Mr. Kroll said. "The consumer will enjoy the power of bipping—it's sort of fun," he stated in pointing up the urgency for the need to create advertising the viewer will want to watch.

Mr. Kroll showed the Four A's audience a 30-minute videotape

(Continued on Page 72)

Creative staffs hard hit: Matthews

WHITE SULPHUR SPRINGS, W. VA.—Most agency payrolls are showing a "substantial" reduction on the creative side of the business, always deemed the heart of an agency's work.

Leonard Matthews, president of the American Assn. of Advertising Agencies, told the membership at their annual conference here that comparisons of agency payrolls of 1960 and 1970 with 1980 show significant increases for new business, client contact and media in 1980 *(see chart below)*. "Significantly down were creative services [art and copy] and general office overhead. If you add print, tv and radio production to creative, total creative services are down a substantial 2%, and that's quite a bit when applied to most agency payrolls," Mr. Matthews noted.

"The key question," he added, "is why? Most of us preach or at least acknowledge that creative work is the single most important thing we do. If this is true, why is creative payroll down, especially in the decade of the 1970s, when most of the decline took place?"

Attempting to find an answer to his question, Mr. Matthews said that during the two earlier recession periods (1970 and 1974-75), "many agencies cut back significantly on sales promotion, merchandising services and package design. These services were labor-intensive for creative departments. Many agencies provided these design services free as part of their full-service concept. But even those agencies which charged creative fees for these services were thought not to be able to recover all their costs."

■ Mr. Matthews also noted that "during the tougher times" in '74-'75 and '79-'80 "many smaller agencies shifted to free lance creative help and reduced in-house creative staff."

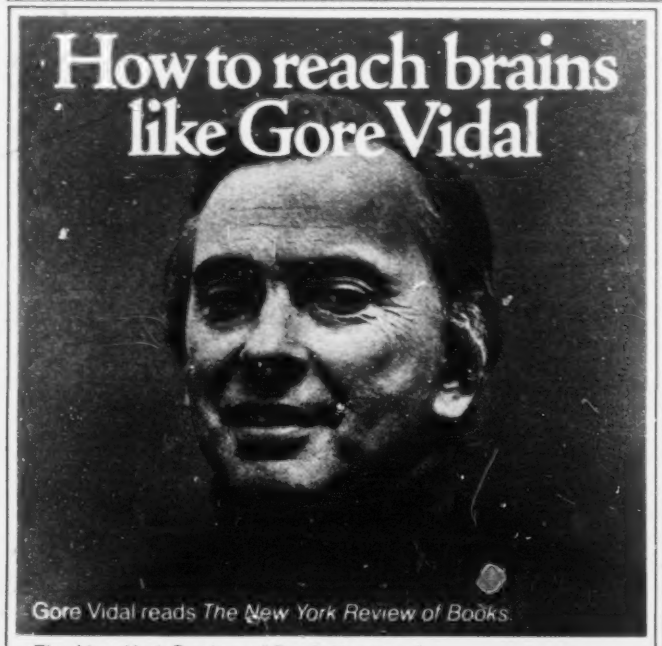
He also pointed to another theory—that the removal of cigaret advertising from broadcast swung a "very large segment" of advertising budgets from tv primarily to print, and print, it is believed, "is less expensive than creating tv commercials."#

Payroll costs as a percentage of total payroll

	1960 %	1970 %	1980 %	% change
New business	5.13	4.38	6.00	+0.87%
Contact	26.62	28.07	27.51	+0.89
Research	2.93	3.10	2.68	−0.25
Media	6.57	7.22	7.71	+1.14
Creative	24.90	24.77	23.73	−1.17
Print production/traffic	6.10	4.81	5.80	−0.30
Tv & radio production/traffic	3.21	3.53	2.70	−0.51
Publicity & pr	1.99	2.77	2.30	+0.31
Accounting	6.22	5.92	6.37	+0.15
Data processing	—	0.31	0.18	+0.18
General office overhead	7.71	6.74	6.04	−1.67
Executive overhead	8.62	8.88	8.98	+0.36
Total	100%	100%	100%	-0-

Source: Four A's annual analysis of agency costs.

How to reach brains like Gore Vidal



Gore Vidal reads *The New York Review of Books.*

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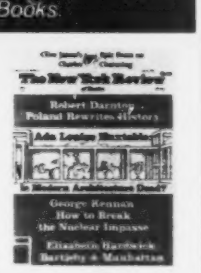

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Ad Council sets illiteracy fight

WHITE SULPHUR SPRINGS, W. VA.—An effort by the American Assn. of Advertising Agencies to combat functional illiteracy has gained Advertising Council support.

The Ad Council's program will be on behalf of a number of leading literacy organizations that formed the Literacy Alliance with the aid of the Four A's.

Don Johnston, J. Walter Thompson Co. chairman and outgoing chairman of the Four A's, said at the annual conference here that after the Four A's board agreed with him three years ago to embark on a program to combat illiteracy, the group produced a directory of organizations that deal with the problem of functional illiteracy in the U.S. At the time, "the thousands of organizations were largely ignorant of each other," he said. The Four A's also developed a newsletter through which these organizations could exchange ideas and programs.

The third step of the program, Mr. Johnston said, will be the Literacy Alliance public service campaign.#

Hot on the trail of market research trends

By Jack J. Honomichl

The U.S. marketing/advertising research industry, which had been steaming along with an annualized growth rate of about 19% from 1975 to 1978—and a "real growth rate" of about 12% after adjustment for inflation—started to run out of steam in 1979-80, and in 1981 fell off to a real growth rate of 3.4%.

Jack J. Honomichl writes a regular column on marketing research in the news pages of ADVERTISING AGE.

This trend is based on the annual revenue performance of leading U.S.-owned research companies, which has been developed exclusively for ADVERTISING AGE since 1975.

Previously there were no substantive measures of the industry's performance.

These leading companies account for the lion's share of the total industry revenues. (Profiles of the top 28 in 1981 start on Page M-7.)

Some of the major companies have revenues from nonresearch activities, but those were not included in this analysis. However, revenues these companies have from operations outside the U.S.

(Continued on Page M-6)

Research trends

(Continued from Page M-5)
were included, and they have been influenced significantly in recent years by foreign currency valuations vis-a-vis the dollar.

Impact of inflation

The need to adjust total growth down to reflect the impact of extraordinary inflation was evident back in 1975. The inflation rate used is the Consumer Price Index-U, as developed by the U.S. Department of Labor.

It is an annual average index based on all urban consumers, U.S. city average, all items (and not to be confused with the December-to-December calculation, also developed by the Department of Labor, which differs and is often higher than the annual average).

Here's how the CPI-U has run over recent years: 1981, 10.4%; 1980, 13.5%; 1979, 11.3%; 1978, 7.7%; 1977, 6.5%; 1976, 5.8%.

The Big Four

The Advertising Age group of top research companies divides naturally into two groups: The Big Four data bank companies —A.C. Nielsen Co., IMS International, Selling-Areas Marketing Inc. and Arbitron Ratings Co.—and the "all other" companies, which are basically in the ad hoc, custom research business. The Big Four, *in toto*, accounted for 68% of the total revenues shown for the top 28 companies in 1981, and so the industry growth rate is heavily weighted by how this group in particular does; in fact, they had a real growth rate, 1981 over 1980, of 3.9%, compared with 2.5% for the "all other" group.

Taking this comparison back to 1977, the real growth rate, adjusted for inflation, of the Big Four combined was 11.4%, compared with 15.1% for the "all other" group.

The "all-other" group, which is heavily weighted by survey research companies, was growing as fast in real terms as the data bank group until a reversal in 1979; from there on, the data bank group has been growing much faster—but still at a declining rate each year.

The data bank group's performance can be explained, in part, by the nature of its businesses—syndicated services—and the leverage that implies; contracts with clients, some of which have automatic inflation kicker clauses, and services that are relatively free from competition. "Sheltered" is the polite terminology.

The "all other" group, by contrast, depends heavily on ad hoc projects, fluctuations in client budgets and fierce "I-can-do-it-for-less" competition, which has inhibited their willingness to raise prices as fast as the cost of doing business (mainly field) went up. Further, some of the larger survey companies depend heavily on work sponsored by agencies of the federal government, and that has dropped off sharply under the Reagan administration's budget cutbacks.

Worldwide business

Of the total revenues shown by the Big Four data bank companies in 1981, 48.3% came from their operations outside the U.S.; for the "all-other" group, this figure was 3.0%. So the Big Four performance was influenced by the worldwide demand for marketing/advertising research, fluctuations in currency values and runaway inflation in many foreign countries.

This makes it difficult to evaluate the international growth rate. A.C. Nielsen, for instance, operates through subsidiaries in 23 foreign countries; IMS International operates in 57.

Some of these foreign operations are known to be long-time losers, and others are still in a startup, developmental mode. But if you look at the domestic revenues of the Big Four, 1981 over 1980, you see a real growth rate of 5.9% versus their overseas growth rate of 1.8%. So the huge overseas business of Nielsen and IMS is one of the weak areas in the 1981 industry growth record.

In perspective

Information like this on the marketing/advertising research industry invites comparison with a kindred group, the 28 largest U.S.-owned advertising agencies. Drawing from the U.S. Agency Income Profile compilation by Advertising Age (March 24, 1982), I make the following comparison for the gross world income in 1981 over 1980:

Total revenue growth for the 28 largest U.S.-owned advertising agencies was 9.0%, with a decline of 1.4% adjusted for inflation, compared with 13.8% total revenue growth for the 28 leading U.S.-owned research companies, with 3.4% adjusted for inflation.

So, for what consolation it offers, the marketing/advertising research industry—relatively—did better than the big agencies.

Conclusions

The 3.4% real growth experienced by the U.S. research industry is not just a function of the current recession or cutback in government spending for research.

The real growth decline started in 1979, and that was largely concentrated in the highly competitive survey research segment of the business, one so competitive that there was hesitation to raise prices parallel to the double-digit inflation that started that year.

The situation undoubtedly was exacerbated by cutbacks in federal government spending for research and the weak overseas performance of the large multinationals in recent years.

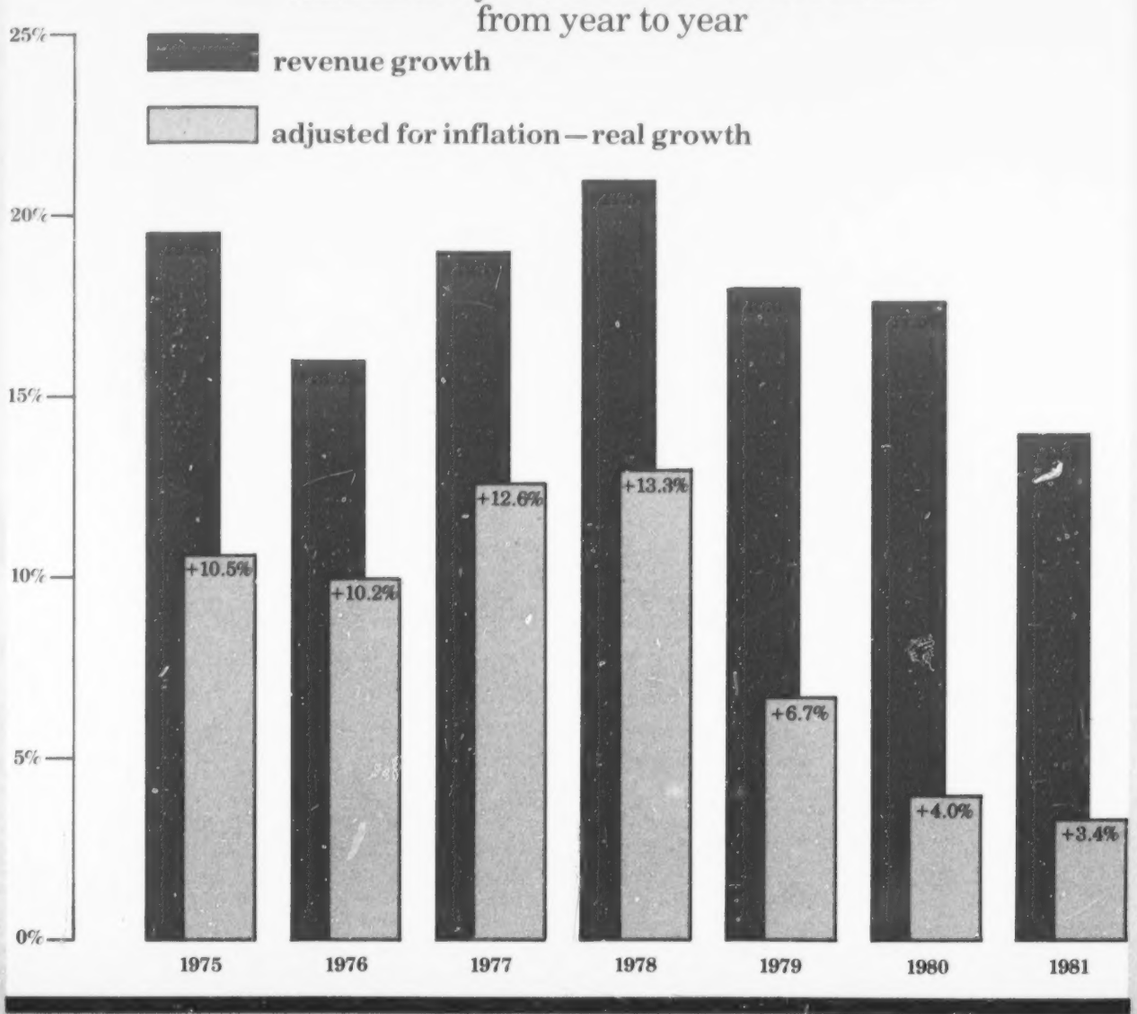
In retrospect, it could have been worse—judging from the performance of U.S. advertising agencies.

Real growth, adjusted for inflation

	Big four data bank companies combined	All others, combined
1981	+ 3.9%	+ 2.5%
1980	+ 5.5	+ .7
1979	+ 9.1	+ 8.2
1978	+12.9	+12.8
1977	+11.4	+15.1

U.S. Marketing/Advertising Research Industry

Measured by rate of increase in revenues from year to year



NOTE ON CHART: Industry growth estimated from aggregate research year-to-year revenue gains of largest companies in the industry as developed by Advertising Age. To wit: 1981, top 28; 1980, top 25; 1979, top 23; 1978, top 20; 1977, top 20; 1976, top 20; 1975, top 10. These revenues reflect all types of data collection—ad hoc and syndicated surveys; custom and syndicated store audits; warehouse withdrawal data; mail panels; UPC scanner derived data; observation measures at retail; continuous diary purchase panels, syndicated and custom; mail intercepts; etc. Revenues also include those from operations outside the U.S.

The annual inflation rate is based on the Consumer Price Index-U, as developed by the U.S. Bureau of Labor Statistics. This is the annual average index, all urban consumers, U.S. city average, all items. (In some of the individual year reports, the CPI December-to-December growth rate was used, and that is slightly different from the annual average index.)

Nation's 28 top market research companies see revenues jump 13.8% in 1981

Industry is hit with its lowest 'real growth' rate in seven years

By Jack J. Honomichl

Revenues of the U.S. marketing/advertising/public opinion research industry were up by 13.8% in 1981 over 1980, according to the seventh annual compilation prepared exclusively for Advertising Age.

Because inflation, as measured by the U.S. Department of Labor's Consumer Price Index, was 10.4% in 1981, the industry's "real growth" was 3.4%, the lowest yet since Advertising Age started this annual analysis in 1975.

Industry performance for 1981 is based on the collective record of 28 of the largest U.S.-owned, for-profit organizations whose main business activity is the development of marketing/advertising/public opinion research. Some of these companies have revenues from nonresearch activities, as is detailed in the individual company profiles that follow, but these revenues were not included in the industry growth revenues. Total revenues of these 28 organizations, including their nonresearch activities, were $1.25 billion in 1981.

The A.C. Nielsen Co., which alone had revenues of $411.3 million in calendar 1981, accounted for 42% of the 28-company total.

The top 28 for calendar 1981 had research revenues of $974.2 million, 34% ($330.4 million) of which came from operations outside the U.S. The same 28 had revenues of $856 million in 1980, making the increase 13.8%.

These companies have about 18,500 fulltime salaried employes and provide work for thousands more hourly part-timers. Eleven of the 28, which as a group account for 80% of the total revenues, are either public companies or subsidiaries of larger public corporations.

The A.C. Nielsen Co., which alone had revenues of $411.3 million in calendar 1981, accounted for 42% of the 28-company total and has considerable leverage on the total industry performance. And, for Nielsen, 1981 was a relatively bad year; its real growth rate was down to 2.8%. This was mostly because of the performance of its Marketing Research Group, which specializes in custom and syndicated store audit work.

In the fourth quarter of 1981, this Nielsen group had, for all practical purposes, no growth, compared with the same period a year ago—and after adjustment for inflation, a loss. That one unit had revenues estimated at $347 million in calendar 1981, up 11% over 1980—a real growth of 0.6%—which is particularly interesting because Nielsen's Index Service contracts have had automatic inflation kicker clauses.

The other debilitating factor was the collective performance of large survey research companies—National Analysts, Chilton, Louis Harris and Westat—which do a large share of their business with agencies of the federal government and were hard hit in 1981 by budget cutbacks in Washington.

Any analysis of the industry logically breaks out to the Big Four data bank companies—A.C. Nielsen, SAMI, IMS International and Arbitron Ratings Co. These four have most of their business under contract, and hence are relatively sheltered from the whims of short-term budget cuts. Their real growth rate, 1981 over 1980, was 3.9% versus 2.5% for the "all other" group, whose business is characterized by ad hoc, custom projects. Of the 24 organizations in this "all other" group, 13 had a revenue growth rate less than the 10.4% inflation rate in 1981.

Here are some highlights of the year's activity related to these top companies:

• **New presidents.** Six of the companies on the 1981 list appointed new presidents since last year's industry roundup: Lars H. Ericson at IMS International; Florence Skelly at Yankelovich, Skelly & White; Humphrey Taylor at Louis Harris & Associates; Carlyle C. Daniel at Selling-Areas Marketing Inc.; Marshall G. Greenberg at National Analysts, and Gian Fulgoni at Information Resources.

• **New listings.** Five companies are new to the listings this year—Winona Inc., Response Analysis, Information Resources, Custom Research and Market Opinion Research. Two were dropped from last year's list. One was Research Information Center, a wholly owned subsidiary of Greyhound Corp. that ranked 25th in 1980. RICI was acquired recently by Winona Inc. The other was National Family Opinion for lack of input.

Following are company profiles of the Top 28, including news of operational changes in 1981 and plans for change in 1982.

How they rank in size

1981 Revenues*: 28 leading U.S.-owned research companies

Rank	Organization	Research Revenues (millions)	% Change vs. 1980	Research Revenues from Outside U.S. (millions)
1.	A. C. Nielsen	$411.3	+ 13.2%	$243.9
2.	IMS International	115.2	+ 12.9	77.2
3.	SAMI	72.6	+ 16.0	—
4.	Arbitron Ratings Co.	66.4	+ 21.5	—
5.	Burke Marketing Services	42.3	+ 26.9	1.3
6.	Market Facts	25.5	+ 9.8	.5
7.	Audits & Surveys	22.5	+ 25.0	—
8.	Marketing & Research Counselors	18.0	+ 22.4	—
9.	NPD/HTI	17.9	+ 21.8	—
10.	WESTAT, Inc.	15.9	− 18.0	—
11.	Chilton Research Services	15.2	− 13.1	—
12.	Maritz Market Research	15.0	+ 29.0	—
13.	ASI Market Research	14.9	+ 10.3	1.5
14.	Yankelovich, Skelly & White	12.6	+ 4.0	.6
15.	Walker Research	12.7	+ 29.2	—
16.	Ehrhart-Babic Group	11.7	+ 7.3	—
17.	Data Development Corp.	11.2	+ 8.7	—
18.	Louis Harris & Associates	10.1	− 2.9	3.4
19.	Elrick & Lavidge	9.3	+ 7.9	—
20.	Opinion Research Corp.	8.2	+ 6.5	—
21.	Decisions Center	3.9	+ 23.0	—
22.	National Analysts	3.7	− 14.1	—
23.	Starch INRA Hooper	3.4	+ 11.1	1.4
24.	Information Resources	3.3	+ 133.0	—
25.	Winona, Inc.	2.6	+ 8.8	—
26.	Response Analysis	0.1	0.0	—
27.	Custom Research	1.7	+ 19.3	—
28.	Market Opinion Research	1.6	+ 14.0	.6
	Total	$974.2		$330.4

*Total revenues which include nonresearch activities, for some companies, are significantly higher. This information is given in the individual company profiles in the main article.

1 **A. C. Nielsen Co.**, Northbrook, Ill. Public corporation traded over the counter; founded in 1923. Research revenues were $411.7 million, up 13.2% over 1980.

Gross revenues for the 12 months ending Nov. 30, 1981, totaled $595 million, of which $411.7 million, or 69.2%, was attributable to the two research divisions—Marketing Research Group and Media Research Group. (To put that into perspective, the largest U.S. advertising agency, Young & Rubicam, in 1981 had worldwide gross income of $353 million on billings of $2.4 billion.)

The Marketing Research Group, for the year ending Nov. 30, had revenues estimated at $347 million, up about 11% over 1980. (Included in the Marketing Research Group revenues are three small organizations that are not strictly market research: Dataquest Inc., Coordinated Management Systems and Product Recovery Services.

The Media Research Group, for the year ending Nov. 30, 1981, had revenues estimated at $64.3 million, up 26.6% over the same period, 1980. (Included in these revenues are those of a small company, Compucon Inc., which is not strictly in the research field.)

Because almost all Nielsen's revenues outside the U.S. are from research activities, it follows that about $167.8 million of total Nielsen research revenues are from the U.S., up about 15.5% over last year. The balance, $244 million was from operations in 23 foreign countries, up about 11.9% over last year.

By geography, Nielsen research

(Continued on Page M-10)

Research top 28

(Continued from Page M-7)
revenues are distributed approximately as follows: U.S., 41.1%; Europe, 39.2%; Canada/Mexico/South America, 12.5%, and rest of world, 7.2%.

During 1981 in the U.S., Nielsen's Marketing Research Group launched a service called Scantrack, which reports weekly brand sales and prices from a sample of more than 100 retail grocery outlets equipped with Universal Product Code scanner equipment. Overseas this group acquired Norges Markedsdata A.S., the largest research company in Norway, and started a new subsidiary, A.C. Nielsen de Colombia S.A. in Colombia.

Traditional Retail Index services are now available in both companies. The Media Research Group is expanding its electronic meter measures of continuous tv viewing into Detroit and Philadelphia, in addition to established markets such as New York City, Los Angeles, Chicago and San Francisco.

Traditional store audit and tv audience measurement services are served through 15 branch offices in the U.S., and worldwide there are approximately 11,000 employes engaged in research activities.

President is N. Eugene Harden, 47, a graduate of Lawrence University. Chairman and chief executive officer is Arthur C. Nielsen Jr., 62, son of the founder, the late Arthur C. Nielsen Sr. Henry Burk, 55, is president of the Marketing Research Group, and James D. Lyon, 46, is president of the Media Research Group.

Harden
A.C. Nielsen

Dubow
IMS International

Daniel
SAMI

2 IMS International, New York. Public corporation traded otc; founded in 1954. Research revenues were $115.2 million, up 12.9% over 1981.

Gross worldwide revenues were $200.9 million in 1981, of which $115.2 million—or 57.3%—came from market research activities through subsidiaries in 57 countries. IMS America, the U.S. subsidiary based in Ambler, Pa., had research revenues of $38 million, up 11.4% over 1980.

IMS is to the world's pharmaceutical/medical industry what the A.C. Nielsen Co. is to the package goods industry. Research activities include retail outlet measures of ethical pharmaceutical sales; panels of doctors reporting on diagnosis and treatment of patients; customized audits of purchases by, for instance, hospitals, laboratories and nursing homes, and custom studies. Emphasis in re-

(Continued on Page M-12)

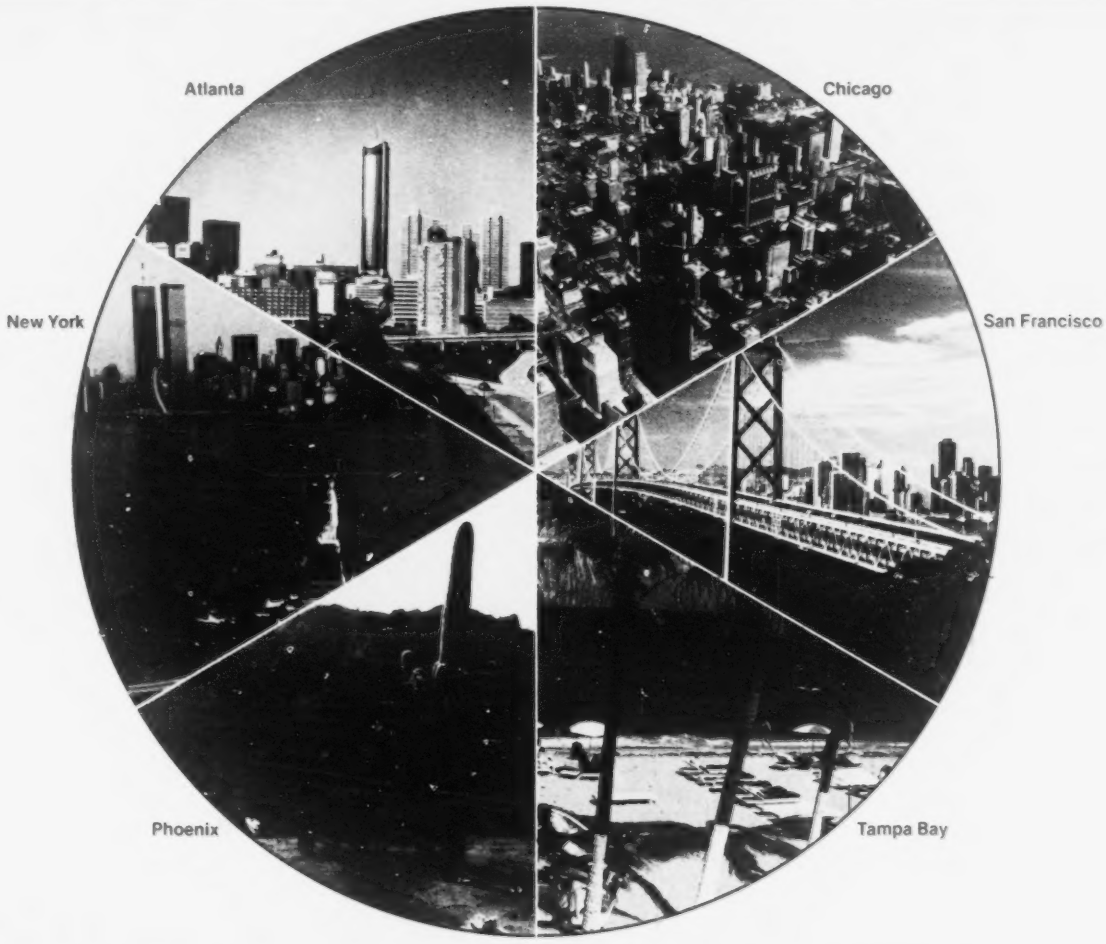
Phone laws

(Continued from Page M-8)
stricts conventional telephone use by survey research and polling organizations. By contrast, several states have laws that restrict the use of ADRMPs—including Alaska, Arkansas, California, Florida, Illinois, Hawaii, Maryland, Missouri, Nebraska, North Carolina, Oregon, Texas, Washington and Wisconsin.

The survey research industry has not been alone in opposing the undifferentiated regulation of unsolicited commercial telephone calls. The opposition camp has included some governmental organizations, telephone companies, the American Bankers Assn., National Retail Merchants Assn., American Newspaper Publishers Assn., U.S. Chamber of Commerce and the Automobile Assn. of America. These groups claim that further regulation of unsolicited commercial telephone calls is unnecessary and that such regulation has constitutional implications. They also have pointed out that bills to regulate or prohibit such calls involve fundamental, and perhaps unresolvable, problems of definition and enforcement.

A Memorandum Opinion and Order released by the Federal Communications Commission in May, 1980, supports many of these objections. The FCC found, for example, relatively few instances of telephone abuse and only a small number of actual complaints by telephone subscribers. The FCC also stated that "[an] outright ban on unsolicited telephone calls would appear to violate constitutional requirements." The FCC then went on to consider, and ultimately to reject, other "less comprehensive regulatory approaches."

Despite the FCC's opinion, and the continuing efforts of CASRO and other organizations, broad and vaguely worded unsolicited telephone bills continue to be introduced at the state level and to be promoted by their sponsors with undiminished enthusiasm. While reasoned dialog has proved an effective antidote once such bills have been introduced, constant vigilance also is required to preserve legitimate telephone use by survey researchers and others. AA



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Call Roger Bacik toll free at 800-241-0643. (Atlanta office)

Research top 28

(Continued from Page M-10)
cent years has been on on-line delivery of data to clients via a system called MIDAS. There are 2,002 fulltime salaried employes in research.

During 1981, IMS purchased sole rights to a service called Pharmacon, which had started as a joint venture with the A.C. Nielsen Co. and provides an automated measure of prescription traffic in drugstores and information on how the prescription was filled.

A consumer research division of IMS owns Trendex, a company in Westport, Conn., that specializes in large scale telephone survey work. Another acquisition, RAM Data Corp., was discontinued recently and written off.

Chairman and chief executive officer of IMS is Lars H. Ericson, 47, who replaced David Dubow, who died in the fall of 1981.

The president of IMS America is Serge Okun, 36, a graduate of the *Ecole Nationale de Statisique et de L'Administration Economique* in Paris.

3 SAMI (Selling-Areas Marketing Inc.), New York. Wholly owned subsidiary of Time Inc.; founded in 1963. Research revenues were $72.6 million, up 16% over 1980.

Shaker
Arbitron

Brown
Burke Int'l

Abrams
Market Facts

The basic activity of SAMI is to amalgamate warehouse withdrawal information to produce continuous movement data for thousands of individual brand items in each of 45 market areas (three of which were added to the system in 1981—Hartford/New Haven, Conn./Springfield, Mass.; Louisville/Lexington, Ky., and Spokane/Yakima, Wash.)

These 45 market areas represent about 83% of the national foodstore ACV (all commodity volume).

In addition, SAMI operates (in a cooperative venture with Burke Marketing Services) three small test markets where foodstore product movement data are captured via UPC scanner equipped stores, and individual household purchase records are captured by electronic monitoring of purchase transactions. This system, called SAMSCAN, includes split-cable tv facilities for copy testing and logging of in-store promotions and newspaper advertising.

During 1981, SAMI offered a new capability, SAMI Segmentation Services, which permits—in selected major markets—the development of product movement data based just on stores located in neighborhoods where there is specific ethnic concentration, such as Hispanics.

Also, in 1981 SAMI discontinued a long time attempt to establish a national warehouse withdrawal service in Canada. SAMI has about 400 salaried fulltime employes.

In June, 1981, Carlyle C. Daniel, 51, a graduate of Lynchburg College, became president of SAMI, succeeding John A. Watters, 56, who became chairman.

4 Arbitron Ratings Co., New York. Wholly owned subsidiary of Control Data Corp.; founded in 1949. Research revenues were $66.4 million, up 21.5% over 1980.

The company, formerly known as Arbitron Co., changed its name on April 20, 1982.

The basic Arbitron business is local market measures of tv viewing and radio listening audiences.

About $29 million in revenues came from radio work in 1982 and about $37.4 million from tv. There are 761 fulltime salaried employes.

Most data collection is via diaries placed in the home (supplemented by telephone interviewing), and more than 2 million households are contacted each year. In New York, Chicago and Los Angeles, Arbitron provides overnight and weekly tv audience reports based on samples of households where the tv sets are equipped with meters. Plans are to add a fourth market, San Francisco, in 1982.

In 1981, Arbitron published its first "Network Cable Report," and a new edition of this syndicated service will be published next June. Also, Arbitron instigated a service called PRIZM/AID, in conjunction with Claritas Corp., to relate listening/viewing measures with geodemographic data at the Zip code level.

In 1981, Arbitron published the results of a $500,000 study designed to document the reliability of radio audience measures, as produced by Arbitron.

President of Arbitron is Theodore F. Shaker, 60, who is also a vp of the parent company. He attended Colgate, Northwestern and New York Universities.

5 Burke Marketing Services, Cincinnati. Privately held corporation; founded in 1947. Research revenues were

(Continued on Page M-14)

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Research top 28

(Continued from Page M-12)

$42.3 million, up 26.9% over 1980.

This research conglomerate, which is owned by a group of employes, consists of six units: (1) AdTel, which specializes in advertising testing and, in a joint venture with Time Inc.'s SAMI, uses three controlled market facilities with dual cable testing facilities, UPC scanner equipped store panels and consumer purchase panels for the purposes of promotion testing; (2) BASES, which specializes in market modeling; (3) Burke Marketing Research, which specializes in custom survey research and pretesting and post-testing of tv commercials; (4) Market Audits, a store audit company; (5) Professional Services, which conducts research training seminars, and (6) Burke Canada, a wholly owned subsidiary. BMSI and Infratest, a German research organization, jointly own Burke International to promote international capabilities.

There are 12 BMSI office locations in the U.S. and 325 fulltime salaried employes. About $1.3 million of the company's revenues come from outside the U.S.

Chairman of BMSI is Jack E. Brown, 37; he attended the University of Cincinnati.

Lysaker
Audits & Surveys

Phillips
Marketing & Rsch

Johnson
NPD/HTI

6 Market Facts, Chicago. Public company traded otc; founded in 1946. Research revenues were $25.5 million, up 9.8% over 1980.

This company's total revenues in 1981 were $26.3 million, of which 97% came from marketing/advertising research activities, $500,000 of which came from outside the U.S.

These revenues include a wholly owned subsidiary, Market Facts-New York, but do not include Market Facts of Canada, in which the parent owns half interest.

If Canada were included, total MF research revenues would be about $28.5 million.

MF's activities in the U.S. include: (1) consumer mail panel (110,000 households); (2) Marketest store audit services (seven permanent markets); (3) four shopping mall facilities; (4) WATS telephone interviewing centers with over 70 stations; and (5) focus group facilities. There are 745 fulltime employes in six cities.

In April, 1982, MF relocated its main operational facilities from Chicago to Oak Park, Ill., and the headquarters office to 676 N. St. Clair St., Chicago.

President and chief executive officer is Jack Abrams, 51, who has an MBA from Northwestern University.

Chairman is David K. Hardin, 54, who has an MBA from the University of Chicago.

7 Audits & Surveys, New York. Privately held corporation; founded in 1953. Research revenues estimated at $22.5 million, up about 25% over 1980.

This estimate for the parent company includes five units: Survey division; test audit division; national total-market audit division; CTIS division, a telephone facility with 125 stations in three locations, Chicago, Washington and Toronto, and a newly established government research division in Princeton, N.J. These units have 267 fulltime salaried employes.

Not included are revenues from other organizations in which A&S or its principals have a financial position: A&S Latinoamerica; Total-Market Index in Canada; Market Probe International; Integrated Computer Systems, an electronic data processing (edp) service bureau.

In addition to custom sample surveys, field and tabulations (data processing), and both syndicated and custom store audit programs, A&S also conducts six times a year observation measures of distribution in 7,600 grocery, drug, discounter and variety store outlets through a system called SADI.

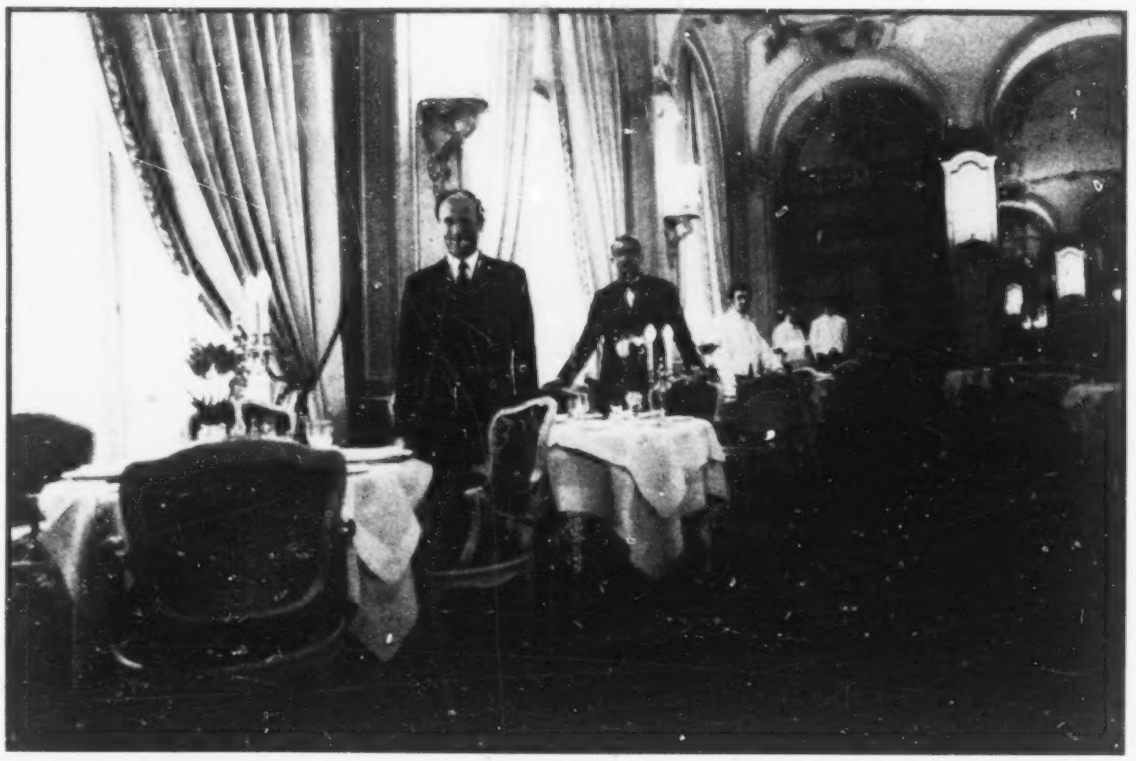
President of A&S is Richard L. Lysaker, 49, who is a graduate of the University of Minnesota. Solomon Dutka, 58, founder of A&S is chairman. He has an M.A. from Columbia University.

8 Marketing & Research Counselors, Dallas. Partly owned subsidiary of Allcom Inc. Research revenues were $18 million, up 22.4% over 1980.

This survey research company in 1981 opened a new interviewing center in St. Louis, bringing the total WATS interviewing positions to 237, 188 of which are on ACRS (Automated Custom Research System). Also in 1981, M/A/R/C introduced an improved TABS program on ACRS, which provides on-line tabulations of study data on a 15-point banner.

A Marketing Science Services group at M/A/R/C specializes in the design and execution of full

(Continued on Page M-16)



BON APPÉTIT

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Research top 28

(Continued from Page M-14)
service research projects that employ sophisticated multivariate techniques.

This group has merged state-of-the-art design and high technology production to conduct segmentation and conjoint analysis using M/A/R/C's true random probability telephone sample.

There are nine full-service offices in M/A/R/C. During 1981, the one in Boston was closed. There are 153 fulltime salaried employes, 206 hourly staff professionals, and 1,200 hourly employes on the M/A/R/C payroll.

The president of M/A/R/C is Cecil B. (Bud) Phillips, 57, who is a graduate of Southern Methodist University in Texas.

9 NPD/HTI, Floral Park, N.Y. Privately held corporation; founded in 1967. Research revenues were $17.9 million, up 21.8% over 1980.

NPD/HTI, the largest purchase diary panel company in the U.S. and a member of the Europanel group of companies, had total revenues of $20 million in 1981, 89% of which came from research activities and the balance from OPOC Computing, an edp service bureau.

Research activities are organized into four divisions: (1) NPD packaged goods, which operates a national and local market purchase diary panels; (2) Home Testing Institute, which operates a standing mail panel of 60,000 families plus 6,000 individuals; (3) GRD/Crest Enterprises, which specializes in measures of out-of-home eating habits, and (4) NPD special industry services, which operates a variety of purchase panels for nonpackage goods categories. There are 190 fulltime salaried employes.

Hunt
Westat Inc.

Kilpatrick
Chilton Research

Bernard
Maritz Research

New services launched in 1981 include Video Probe Index to track new, emerging electronic media; NGA Ski Audit, a joint venture with Acker Retail Audits and GfK of Nurnberg, Germany, and Record and Tape Tracking Service, a diary panel service servicing the Recording Industry of America Assn. (RIAA).

Coming up in 1982 are a Toy Audit and the Sports Market Index to track purchasing of all sporting goods items.

Later this year NPD plans to relocate and consolidate five different offices into one new 85,000-sq.-ft. facility being constructed in Port Washington, N.Y.

Tod Johnson, 37, is chief executive officer of NPD Research (and OPOC). He holds B.S. and M.S.I.A. degrees from Carnegie-Mellon University. Chairman and founder of the NPD companies is Henry Brenner.

10 Westat Inc., Rockville, Md. An employe-owned corporation; founded in 1961. Research revenues were $15.9 million in 1981, down 18% from 1980.

This survey research company, with 183 fulltime salaried employes, gets about 90% of its revenues from studies done for agencies of the federal government, and the completion of one very large such study is mainly responsible for the 1981 drop in revenues.

Data collection is via personal, face-to-face interviewing, mail and telephone, and during 1981 Westat expanded its Telephone Research Center and instigated cati (computer assisted telepone interviewing). Westat operates out of a new, 75,000-sq.-ft. office facility in Rockville, a suburb of Washington.

President and chief executive officer of Westat is Joseph A. Hunt, 46, who has an M.S. from Massachusetts Institute of Technology. Edward C. Bryant, 67, the founder of Westat, is board chairman.

11 Chilton Research Services, Radnor, Pa. Wholly owned subsidiary of American Broadcasting Co.; founded in 1957. Research revenues were $15.2 million, down 13.1% from 1980.

A custom survey company that does studies for both industry and agencies of the federal government, Chilton maintains one of the largest cati installations in the U.S.—125 stations, excluding two banks that are used only for the continuous AT&T Telsam studies.

In 1981, Chilton closed two branch operations, one in Chicago and one in Washington. There are 170 fulltime salaried employes.

Director of Chilton Research Services is Dean J. Kilpatrick, 37, who has an MBA from the University of Delaware. He is also a vp of Chilton Co.

12 Maritz Market Research, Fenton, Mo. Wholly owned subsidiary of Maritz Inc.; founded in 1973. Research revenues estimated at $15 million, up 29% over 1980.

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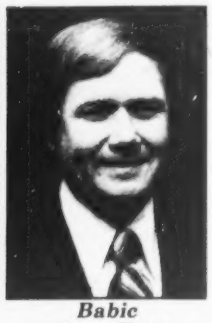
Babic
Erhart-Babic

syndicated research through several units: (1) full-service consumer research operations in St. Louis, Minneapolis, Detroit, and Toledo, O. (the Minneapolis operation is the result of the acquisition of Quatra Marketing Research on Jan. 1, 1981, and the Detroit/Toledo operations are from the 1980 acquisition of Rogers National Research, a company that specializes in automotive and financial market research.); (2) a coast-to-coast field service division of 15 offices, which have 23 mall locations, 15 telephone and 23 focus group facilities and a St. Louis-based WATS survey center; (3) three research centers operating exclusively for WATS/crt (cathode ray tube) and interviewing facilities for corporate sponsors, and (4) an agricultural research division (added in 1981) serving agribusiness clients. There are 140 fulltime employes at MMRI.

President of MMRI is Paul E. Bernard, 52, who is a graduate of the University of Missouri.

13 ASI Market Research, Los Angeles. Privately held corporation. Research revenues were $14.9 million, up 10.3% over 1980.

Total ASI revenues in 1981 were $19.4 million, of which 77% were from research activities, and $1.5 million of that was from a wholly owned subsidiary in Hong Kong.

ASI specializes in controlled audience pretesting and on-air testing of tv commercials, custom research projects, testing of print ads, and focus groups. The company operates a 70-station WATS line telephone center in Los Angeles.

Total ASI staff is about 1,100, 350 of whom are fulltime salaried.

President of ASI is Gerald Lukeman, 50, a graduate of Dartmouth College. Pierre Marquis, 55, a graduate of Boston University School of Law, is chairman.

14 Yankelovich, Skelly & White, New York. Wholly owned subsidiary of Reliance Group; founded in 1958. Research revenues were $12.9 million in 1981, up 4% over 1980.

This survey research company does marketing and social research for industry, governmental agencies, and media—most notably *Time* and *Fortune*. Standardized services include (1) Laboratory Test Market, a market simulation facility; (2) Monitor, tracking surveys of special social segments; (3) Corporate Priorities, tracking studies on public policy issues, and (4) the New Worker, tracking values and attitudes within the work force. About 2% of revenues come from outside the U.S.

There are about 160 fulltime salaried employes at YS&W, located in three offices in the U.S.

Founder and chairman of YS&W, Daniel Yankelovich, 57, is a graduate of Harvard University. President is Florence Skelly, a graduate of Hunter College.

15 Walker Research, Indianapolis. Privately held corporation; founded in 1964. Research revenues were $11.7 million, up 29.2% over 1980.

This survey research organization is separated into various divisions as follows: (1) custom research division, which conducts customized, ad hoc projects from offices in Indianapolis and Morristown, N.J.; (2) service research division, which specializes in survey work for service-related industries, such as utilities, healthcare, home/business service, and travel/transportation services, and (3) data collection/processing division, which manages Walker's eight branch data collection offices and its interactive computer and data processing system that is in Indianapolis.

This office network offers a variety of services, including mall intercept, prerecruited focus groups, local telephone interviewing and national WATS interviewing through a 200-station setup in Phoenix and Indianapolis.

During 1981 Walker added crt interviewing capabilities to its arsenal of research techniques.

President and chief executive officer of Walker is Frank D.

(Continued on Page M-18)

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Research top 28

(Continued from Page M-17)

Walker, 47, son of the company founder, Mrs. Tommie Walker Anderson, who started a predecessor, Walker Research Services, in 1939. Mr. Walker is a graduate of DePauw University.

16 Ehrhart-Babic Group, Englewood Cliffs, N.J. Privately held corporation; founded in 1958. Research revenues were $11.7 million, up 7.3% over 1980.

The E-B Group includes Ehrhart-Babic Associates, which specializes in custom store audits, projected sales studies, controlled store tests and minimarkets and National Retail Tracking Index, a unit that does national syndicated distribution studies of retail outlets (such as grocery stores) on a fixed schedule. In 1982, NRTI expanded its store panel to include building materials, hardware, garden supply and tire/battery and accessory dealers. NRTI also has a national wine, liquor and beer index. (Revenues from another E-B Group unit, Ehrhart-Babic Data Services, an edp service bureau, are not included in this analysis.)

Scan Plus, a service that provides in-store promotional information from UPC scanner-equipped supermarkets, will be expanded in 1982 to offer controlled store tests in selected outlets.

There are 126 fulltime salaried employes at E-B Group, and about 2% of revenues come from outside the U.S.

Founders of E-B Group are its current president, Louis J. Babic Jr., 49, a graduate of Boston University, and its chairman, Thomas A. Ehrhart, 57, who is a graduate of Pace University.

17 Data Development Corp., New York. Privately held corporation; founded in 1960. Revenues were $11.2 million, up 8.7% over 1980.

Revenues reflect all units: Data Development Corp., Central Location Testing, New York Conference Center and the Telephone Center, which plans to install crts in its WATS line system in 1982.

DDC, which has 150 fulltime employes, specializes in custom research and in 1982 launched ADOPTER, a new product sales forecasting system. Another new service, COMBO, a product test technique for priorizing modifications of a new product to maximize purchase interest, was recently announced. Also, DDC has recently introduced COPY II, a program designed to develop copy strategy in the area of image advertising.

DDC is jointly managed by Jerry Rosenkranz and president Joseph Goldstein. Both are 46 and graduates of the City College of New York.

18 Louis Harris & Associates, New York. Wholly owned subsidiary of Gannett Co., founded in 1956. Research revenues were $10.1 million, down 2.9% from 1980.

About 34% of Harris's volume comes from subsidiaries outside the U.S.—Louis Harris International in London and Louis Harris France in Paris. Domestically, there are two subsidiaries: The National Center for Telephone Research in New York and Louis Harris & Associates in Washington. In total, there are 118 fulltime salaried employes.

LHA specializes in custom survey work of commercial clients and agencies of the federal government and has several shared-cost survey programs that track public opinion.

President and chief executive officer of LHA is Humphrey Taylor, 47, who is a graduate of Cambridge University.

Chairman and chief executive officer is the company's founder, Louis Harris, 61, who is a graduate of the University of North Carolina at Chapel Hill.

19 Elrick & Lavidge, Chicago. Wholly owned subsidiary of Equifax; founded in 1951. Research revenues were approximately $9.3 million, up 7.9% over 1980.

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which has 128 fulltime salaried employes, does product concept studies, tracking and trade studies, sales forecasting and focus group interviewing.

The company also operates three mall interviewing centers, the newest of which is located in Tampa Bay, Fla.

In addition to a 50-position crt phone capability in Nashville, Tenn., which is devoted to the AT&T Telsam studies, E&L has its own 35-position cati phone center in Atlanta.

President of E&L is Robert J. Lavidge, 60, who has an MBA from the University of Chicago.

20 Opinion Research Corp., Princeton, N.J. Wholly owned subsidiary of Arthur D. Little; founded in 1938. Research revenues were $8.2 million, up 6.5% over 1980.

ORC, which has 141 fulltime employes, maintains branch offices in Chicago, New York, San Francisco and Washington. In addition to custom, ad hoc studies for industry and agencies of the federal government, ORC does numerous shared-cost surveys periodically, such as the Public Opinion Index (opinions of target groups such as business executives, Washington thought leaders, the investment community, etc.); a Corporate Reputation Survey; the Marketing Index, which tracks trends and issues; Travel Plus, a study of the travel market, and the Caravan studies.

President of ORC is Harry W. O'Neill, 51, who holds an M.S. from Pennsylvania State University. Chairman and chief executive officer is Irwin Miller, 53, who is a vp of Arthur D. Little. He holds a Ph.D. from Virginia Polytechnic Institute.

21 Decisions Center, New York. Privately held corporation; founded in 1965. Research revenues were more than $6.9 million, up 23% over 1980.

DCI, a custom survey company, has 102 fulltime employes and has three divisions: Qualitative Decisions Center, DCI International and Facts Center, a WATS telephone interviewing operation with 60 lines.

DCI is jointly managed by chairman Bernie Ruderman and president Bernie Levine. Mr. Ruderman, 50, has an M.S. from Pennsylvania State University, and Mr. Levine, 56, has an MBA from New York University.

22 National Analysts, Philadelphia. A division of Booz-Allen & Hamilton; founded 1943. Research revenues were $6.7 million, down 14.1% from 1980.

This survey research company does custom work for industry and agencies of the federal government and provides support services to the parent, Booz-Allen & Hamilton, a prominent consulting company. A dropoff in government work is one of the main reasons for its decline from 1980 levels. There are 86 fulltime employes based in two offices, Philadelphia and New York City.

Specialties include the financial services industry; telecommunications; all major elements of the information industry, including office equipment; medical equipment and pharmaceuticals; automotive industry, and the beverage industry.

Marshall G. Greenberg, 46, is the president of NA. He holds a Ph.D. in mathematical psychology from the University of Michigan.

23 Starch INRA Hooper, Mamaroneck, N.Y. Public corporation traded otc; founded in 1923. Research revenues were $6.4 million, up 11.1% over 1980.

This survey research company is composed of seven divisions: Starch Ad Readership Service; Daniel Starch (Canada) Ltd., which has an annual volume of $1.4 million; INRA (International Research Associates), a 31-country network of affiliated research organizations; Associates in Diagnostic Research; C.E. Hooper; Media Audience

(Continued on Page M-20)

adventure, our readers are in the driver's seat.

They enjoy fizz from club soda and champagne.

They listen to the top ten and Beethoven's Ninth.

They're the most willing and responsive consumers.

So shift your gears to House & Garden *and drive your advertising home.*

House & Garden, *350 Madison Avenue, New York, New York 10017 (212) 880-8303*

We're not like any other house on the block.

Tell-Back Provides

. . . the definitive means for learning from and about people in groups.

Learn more, see page M-25

Research top 28

(Continued from Page M-19)
Research, and the Roper Organization, which was acquired in March, 1981. The Roper acquisition added a central telephone interviewing facility in New York City to the Starch organization. There are 170 fulltime salaried employes.

President and chief executive officer of SIH is William J. (Jay) Wilson, 45, a graduate of Yale University.

24 Information Resources, Chicago. Privately held corporation; founded in 1979. Revenues were $6.4 million, up 133% over 1980.

This new company is primarily engaged in the operation of BenaviorScan, four controlled markets where purchase data are captured by UPC scanning equipment at the retail level. Consumer purchases at the household level are captured via a sample of households that have their purchases recorded at time of purchase, and split-cable tv capability that makes it possible to relate all three—store movement, demographics of purchasers, and controlled tv exposure. BehaviorScan plans to add two additional markets to the system before the end of 1982.

BehaviorScan is used primarily for advertising campaign testing, in-store promotion tests and test marketing of new products.

Chairman and chief executive officer of IRI is John Malec, 37, a graduate of the University of Wisconsin. President is Gian Fulgoni, 34, who has a master's degree from Manchester University in England.

25 Winona Inc., Minneapolis. Privately held corporation; founded in 1953. Research revenues were $5.6 million, up 8.8% over 1980.

This custom survey research company was founded as Winona Interviewing Service, primarily a field agency; it added professionals in 1968 to become a full-service supplier. There are two mall operations (Minneapolis and Phoenix), and recently a sales office was opened in San Francisco. There are 73 fulltime salaried employes.

Winona made news recently (AA, March 15, 1982) with the acquisition of Research Information Center, a subsidiary of Greyhound Corp., located in Phoenix, and No. 25 in the 1980 top 25 listings, with revenues of $5.1 million. (This acquisition is not reflected in the Winona revenues shown above.)

President of Winona is Richard McCullough, 38, a son of the founder, Marian S. McCullough. He has a B.A. from the University of Minnesota.

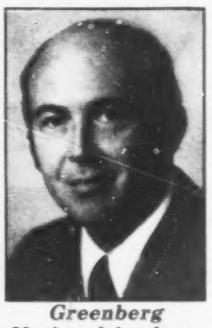
Goldstein
Data Development

Taylor
Louis Harris

Lavidge
Elrick & Lavidge

Miller
Opinion Research

Ruderman
Decisions Center



Greenberg
National Analysts

26 Response Analysis, Princeton, N.J. Privately held corporation; founded in 1969. Revenues were $5.1 million, no change from 1980.

RA and a division, Advanced Research Resources Organization (ARRO), which is based in Washington, have a fulltime staff of 95.

Specializing in custom survey research for industry, associations and agencies of the federal government, RA also operates a telephone interviewing facility in Princeton.

Co-founder and president of RA is Herbert I. Abelson, 56, who received his Ph.D. from the University of Maryland.

The other co-founder of the company is Reuben Cohen, 60, who has an M.A. from the American University.

27 Custom Research, Minneapolis. Privately held corporation; founded in 1974. Research revenues were $4.7 million, up 20.5% over 1980.

This company does custom survey research for consumer and industrial product clients, specializing in telephone interviewing through two facilities

One th
on th

Not included in the 1981 Top 28 group, but sure to be included in the 1982 listing, is the Marketing Services Group of Harte-Hanks Communications, a communications conglomerate based in San Antonio, Tex.

HHC started its expansion into the research field in 1975 by funding an entrepreneurial venture, RMH Research, a survey company based in Fair Lawn, N.J. Today RMH includes RMH Media Research and National WATS Services. In 1978, HHC acquired Urban Data Processing

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OmniTel

FREQUENCY
WEEKLY (every Friday)

METHOD
Telephone interviewing

SAMPLE
1000 national interviews. A random digit dialing (RDD) sample of U.S. households. 500 females, 500 males, all 18 plus.

SUPPLEMENTS
Teens, children, ethnic groups.

BENEFITS
Results delivered 3 working days from start. Low cost. Demographic breakdowns included.

IN SUMMARY
52,000 telephone interviews each year.

aim

FREQUENCY
MONTHLY

METHOD
Personal Interviewing

SAMPLE
2000 national interviews. A probability sample of U.S. households. 1000 females, 1000 males, all 18 plus.

SUPPLEMENTS
Teens, children, in-home audits, leave behinds with personal or mail retrieval.

BENEFITS
Use of exhibits, cards, scales. Personal interviewing at a fraction of custom costs. Demographic breakdowns included. Fast delivery.

IN SUMMARY
24,000 in-home, personal interviews each year.

*** And one other way is to conduct your *custom* research . . . WATS/central location telephone, mall intercepts, at home personal interviews, focus groups (either nationally or in select markets) . . . from design through analytic report, utilizing the extensive experience and background of R. H. Bruskin Associates.**

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ORANGE COUNTY 136 Westminster Mall, Westminster, CA 92683 (714) 898-0906
MOORESTOWN Moorestown Mall, Moorestown, NJ 08057 (609) 234-5440
BAY SHORE South Shore Mall, Bay Shore, NY 11706 (516) 666-4411 (212) 895-6109
PHILADELPHIA 109 Neshaminy Mall, Cornwells Heights, PA 19020 (215) 322-0400 (212) 986-7601
MASSAPEQUA 370 Sunrise Mall, Massapequa, NY 11758 (516) 541-5100 (212) 895-2886
SAN FRANCISCO Sun Valley Mall, Concord, CA 94520 (415) 798-2700
OKLAHOMA CITY 1153 Cross Roads Mall, Oklahoma City, OK 73149 (405) 631-9738
SAN JOSE 1268 Town Center, Sunnyvale, CA 94086 (408) 730-9777

that total 40 stations, many of which are crt-equipped. The Medical Research Bureau division specializes in product testing in healthcare. There are 65 fulltime staffers at CRI and a branch office in New Jersey.

CRI is managed by Judith S. Corson, 39, a graduate of the University of Minnesota, and Jeffrey L. Pope, 41, who has an MBA from Northwestern University.

28 Market Opinion Research, Detroit. Privately held corporation; founded in 1941. Research revenues were approximately $4.7 million in 1981, up 14% over 1980.

This survey research company has 80 fulltime salaried employes in three Michigan offices (Detroit, Dearborn and Southfield) and a subsidiary, Canadian Opinion Research, Ltd., in Toronto, Canada. MOR specializes in media research, corporate and government affairs and political studies—mostly for Republican Party candidates at the state level. MOR was the organization used most by George Bush in his campaign for the presidency in 1979-80.

Chairman and ceo of MOR is Frederick P. Currier, 58, who received his M.A. from the University of Illinois. The president is Robert M. Teeter, 43, who received his M.A. from the University of Michigan and is well known as a political consultant and analyst. AA

Wilson
Starch INRA

Malec
Info Resources

McCullough
Winona

Abelson
Response Analysis

Corson
Custom Research

Currier
Market Opinion

Tell-Back Provides

. . . a unique insight into the authentic real time ongoing response of as many as fifty persons gathered at any one time and place.

Learn more, see page M-25

at's not e list

in Burlington, Mass., a company specializing in custom processing of U.S. Census data for purposes such as site location.

Early in 1982 (AA, April 12), HHC acquired Tele-Research, a Los Angeles-based company specializing in tv copy testing, and TRIM, a research company that pioneered use of Universal Product Code scanner data for controlled store tests. TRIM also is located in Los Angeles.

Harte-Hanks started expanding into the research field in 1975 by funding RMH Research.

Hochhauser
Harte-Hanks

All of these units are part of the HHC Marketing Services Group. The president is Richard Hochhauser, 37, the founder of RMH Research. He received his M.B.A. at Columbia University. AA

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BASES—a system for reducing the high cost and risk of new product development. ADTEL—a service that measures the effect of advertising and promotion on actual consumer sales. MARKET AUDITS—specialists in in-store research and minimarket testing. BURKE MARKETING RESEARCH—the nation's most respected custom survey research organization.

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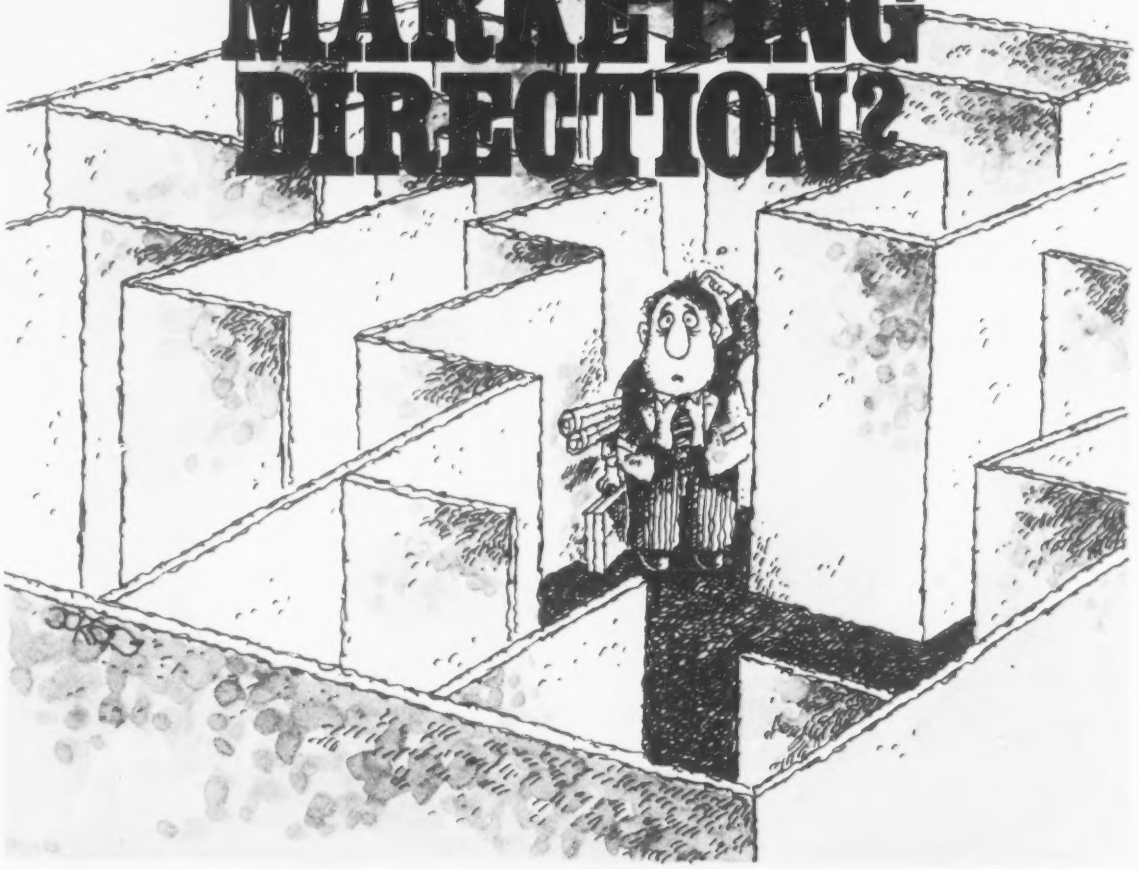
UNCERTAIN MARKETING DIRECTION?



Scanner tests show supermarkets can improve category profits: GF

CHICAGO—Early results of an experimental scanning project being conducted by General Foods Corp. and Dick's Supermarkets in Wisconsin indicate that retailers can significantly improve category profitability by using scanning data properly, a GF exec said at a workshop during the recent Food Marketing Institute here.

And, once the use of scanners becomes more sophisticated, retailers will look for more substantiated sales data from marketers and may be unwilling to accept items whose sales are "out of sync with casepacks," Kenneth Robb, sales analysis manager for GF, said after the seminar.

In their overview of ScanLab, the 18-month-old project on the use of scanning data for merchandising decisions, principals of the experiment said that, in three initial test categories—detergent, dog food and shampoos/conditioners—ScanLab data resulted in merchandising decisions that ultimately increased gross profits 8% in ScanLab stores over the control stores in a few months of tests.

■ In detergents, the scanning data, including unit movement and retail price, suggested the need for reallocation of space for subcategories—specifically, more space for heavy-duty liquid detergents—resulting in a different product mix in ScanLab stores vs. control stores.

The analysis of the dog food section "revealed potential for overall category space reduction, with the freed-up space going to a nearby category [cat food] that was undershelved."

And in the shampoos and conditioners segment, ScanLab data allowed the retailer to "respond more quickly to new product introductions" that included 17 new items in only a few months.

Confirming the findings of FMI's 1982 trend study, J. Mark Harran, director of customer strategy and development at GF, said most grocery stores with scanning capabilities now use it only in "operational areas." The FMI study said 94% of the grocery stores now using scanners use them for checker performance.

Only 40% of all grocery retailers with scanners now use their equipment to evaluate new product performance, according to the FMI study, though about two-thirds use the scanners for coupon accounting and tracking specials.

Of the supermarkets surveyed by FMI, only about 14.5% said they were completely on scanners, but, according to Timothy Hammonds, senior vp at FMI, about 20% will be by this summer.#

Sidebars

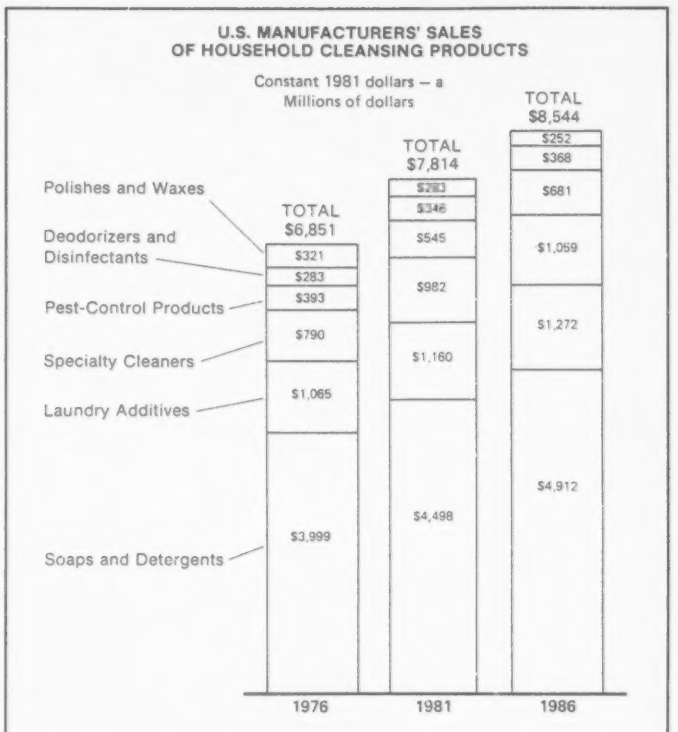
(Continued from Page 30)

rassment to the team's traditions, to Yankee fans and to baseball. I await the day that he trades himself, or sells the team, to someone with an understanding of what it means to play in the Major Leagues. . .

KeeperQuote: Billy Wilder, now 75, tells Michiko Kakutani in the *New York Times* of May 4 about his approach to moviemaking: "The basic point is to bring them in and keep them awake. The picture where it starts at 8, and at midnight, I look at my watch and it's 8:15—that's the kind of picture I hate. . ."#

Cabletime Net Sales opens

ARLINGTON, VA.—Cabletime Network Sales has opened to sell commercial time on cable systems serving 35,000 homes in Alexandria, Va., and here. Offices are at 2707 Wilson Blvd.

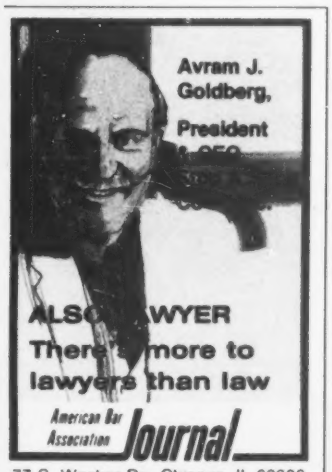


a – 1976 data adjusted to 1981 dollars using GNP implicit price deflator

Source: Charles H. Kline & Co.

Cleaning products outlook

Although sales of household cleaning aids are expected to pick up after two years of flat sales, the annual growth rate of these products over the next five years will average less than 2% annually in constant 1981 dollars, according to a survey by Charles H. Kline & Co., Fairfield, N.J., whose chart is shown here. The fastest growing segments of the market will be specialty categories, the research company predicts.



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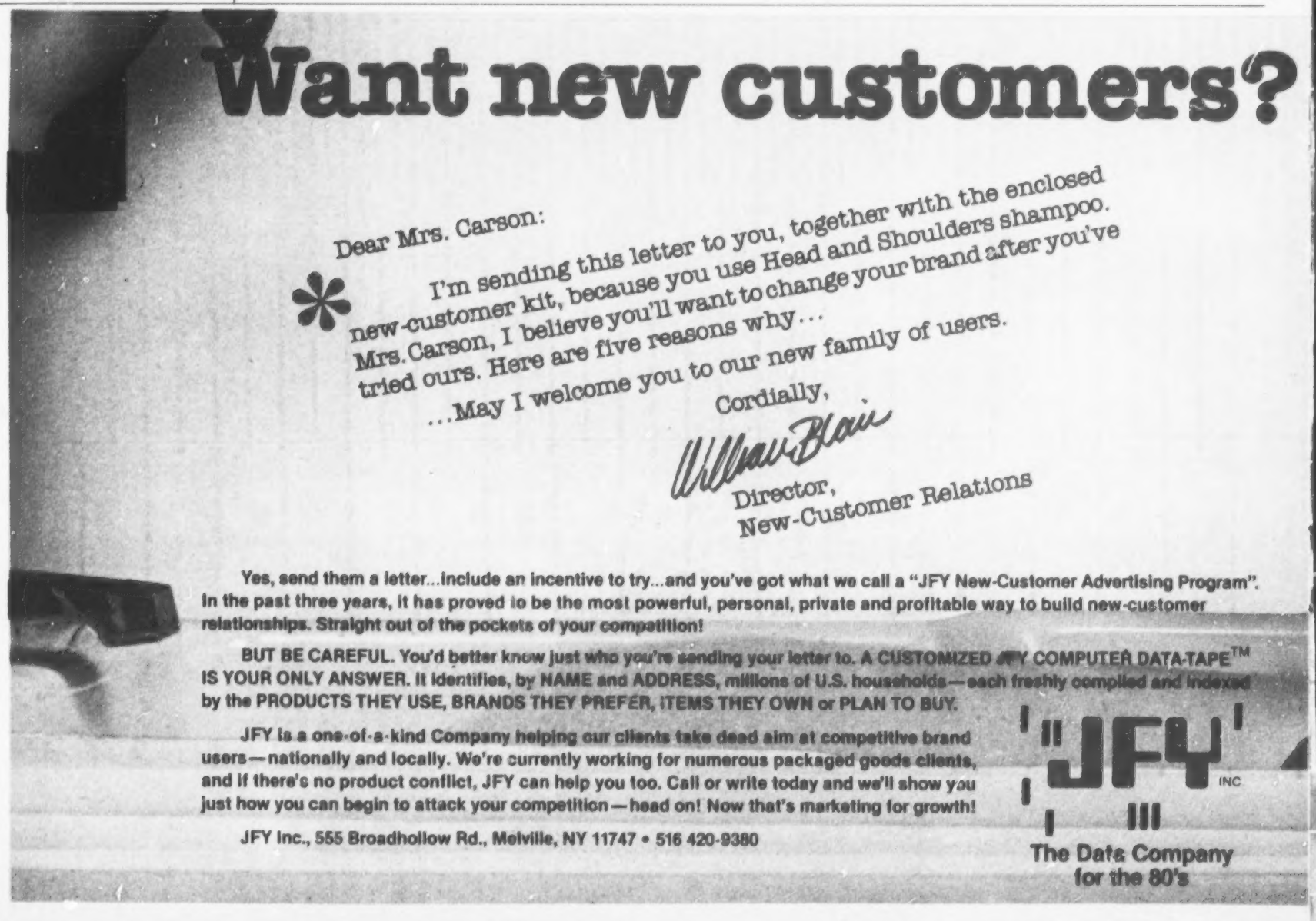
Want new customers?
Dear Mrs. Carson:
I'm sending this letter to you, together with the enclosed new-customer kit, because you use Head and Shoulders shampoo. Mrs. Carson, I believe you'll want to change your brand after you've tried ours. Here are five reasons why...
...May I welcome you to our new family of users.
Cordially,
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Yes, send them a letter...include an incentive to try...and you've got what we call a "JFY New-Customer Advertising Program". In the past three years, it has proved to be the most powerful, personal, private and profitable way to build new-customer relationships. Straight out of the pockets of your competition!
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Advertising pages in May consumer publications

Current and May '81 figures for U.S., Canadian and foreign publications reporting to Advertising Age

	Pages			
	May 1982	May 1981	Jan.-May 1982	Jan.-May 1981
Women's				
†§Bride's Magazine	251.7	212.1	888.0	829.3
▲Co-ed	35.0	39.0	154.1	164.6
§Cosmopolitan	206.5	212.0	949.1	960.6
Essence	59.5	96.8	394.1	380.3
§Family Circle	123.9	121.8	654.4	644.3
§Good Housekeeping	170.4	194.8	784.4	809.7
▲Health	29.5	32.6	146.2	144.5
Ladies' Home Journal	80.2	91.8	355.1	411.9
Lady's Circle	10.3	8.2	47.0	56.4
McCall's	101.6	97.2	395.7	481.6
F. McCall's Working Mother	67.9	103.3	292.9	169.3
†Modern Bride	183.1	154.8	812.8	689.0
Ms.	49.5	41.7	213.0	209.0
○New Woman	41.3	54.7	174.9	138.3
§Parents Magazine	79.2	70.1	344.3	306.7
Playgirl	42.7	46.6	204.6	225.3
Self	84.6	84.4	342.9	326.6
Seventeen	117.0	132.0	510.9	514.4
Soap Opera Digest	34.3	7.0	117.0	35.8
'Teen Magazine	53.5	54.5	219.8	215.1
§True Story	55.0	54.2	273.0	280.0
§Woman's Day	104.2	96.4	573.3	573.0
▲The Workbasket	30.0	33.0	188.5	175.3
Working Woman	99.4	75.8	398.8	294.6
	2,119.3	2,114.8	9,434.8	9,035.6
*** % change 1982 vs. 1981	+0.2%		+4.4%	
General				
▲A.D. Magazine	13.6	17.0	67.3	78.6
Air Progress	23.4	22.8	89.5	89.6
▲American Film	18.7	25.3	98.8	106.0
American Forests	8.3	11.3	54.1	65.5
American Legion	22.3	17.1	169.0	137.6
American Photographer	47.5	29.7	221.6	194.1
American West	28.8	30.5	73.0	79.3
○Americana	27.1	23.3	94.5	89.7
§The Atlantic	34.8	25.3	130.5	131.1
○Audubon Magazine	30.1	31.8	94.6	89.2
BBI Jewish Monthly	22.3	21.2	122.5	110.8
§Bon Appetit	99.1	105.9	394.5	407.2
Book Digest	17.3	19.9	115.9	147.5
Changing Times	43.4	24.2	186.5	151.6
Christian Herald	34.0	41.0	190.4	205.3
Christian Life	22.6	26.0	139.7	132.8
☆Christianity Today	51.2	62.8	341.2	362.8
Circus	27.8	17.3	137.8	72.8
Complete Men's Group	22.0	21.3	111.8	105.8
Country Journal	44.7	34.9	221.6	215.5
Creative Computing	115.5	96.0	572.2	430.1
D. Cuisine Magazine	43.1	40.4	211.2	165.0
Dance Magazine	85.3	86.3	339.8	342.3
Ebony	96.0	87.3	399.2	393.3
▲Elks Magazine	22.6	18.3	121.4	123.4
§Esquire	72.6	37.2	265.0	152.8
Fifty Plus	31.3	29.5	151.4	172.4
Flying	52.7	46.8	224.8	211.8
○Games	25.3	21.6	77.1	61.7
§Gentlemen's Quarterly	97.0	100.0	458.1	469.4
Geo	14.3	22.0	86.4	108.0
Golf Digest	83.0	76.9	385.5	409.3
§Golf Magazine	61.1	72.7	462.1	468.2
Gourmet	81.5	79.4	330.6	310.2
§Harper's Magazine	11.0	18.0	79.6	115.1
High Fidelity	24.3	33.6	178.3	201.2
High Technology	59.1	—	121.9	—
#Inside	58.6	51.9	127.7	119.1
Kiwanis Magazine	11.6	14.8	72.9	73.6
Let's Live	82.3	87.6	381.3	431.0
Life	56.4	65.8	253.3	272.9
Lion	9.5	4.7	31.5	23.3
Modern Photography	124.5	117.5	577.6	574.9
§Money	127.1	108.7	521.8	471.5
Moneysworth	18.2	15.5	80.3	78.7
Moody Monthly	44.8	46.1	269.8	295.3
Moose Magazine	22.0	19.0	109.0	100.0
○Mother Earth News	49.6	44.0	155.0	156.6
○Museum	127.1	108.7	521.8	471.5
Musician, Player & Listener	53.0	—	259.3	236.5
National Geographic	20.9	33.5	109.0	144.6
Natural History	36.9	32.8	157.6	186.0
§Omni	60.0	47.8	266.0	246.0
§Penthouse	49.3	63.3	304.9	384.5
Petersen's Photographic	39.2	44.0	211.5	216.9
Playbill	61.0	53.5	268.2	256.9
§Playboy	104.5	119.7	517.8	543.2
Popular Photography	124.8	142.8	636.5	663.0
Prevention	67.4	82.3	346.2	435.7
Psychology Today	38.2	41.1	189.3	233.8
§Reader's Digest	102.6	125.4	418.2	457.5
Rotarian	19.6	14.0	73.3	70.8
††Saturday Evening Post	50.0	45.5	191.8	182.7
Science Digest	30.2	25.5	146.8	136.4
◊Science 82	19.9	37.1	133.9	162.7
Scientific American	95.3	78.8	389.6	420.1
Signature	48.5	52.4	274.6	254.9
Smithsonian	91.6	84.9	394.9	390.4
Stereo Review	43.8	52.7	253.1	269.1
Success	30.8	31.1	131.3	137.7
Tennis	74.0	66.0	309.1	300.0
Town & Country	167.1	151.0	641.6	580.0
Travel/Holiday	46.3	47.0	275.2	268.6
Travel & Leisure	126.1	101.2	493.6	457.2
▲V.F.W.	27.1	22.4	144.6	147.2
Video	54.2	62.0	258.3	248.7
Video Review	50.7	50.2	311.3	238.7
Weight Watchers	25.2	21.9	134.7	116.3
World Tennis	45.1	63.5	266.7	224.3
Writers Digest	22.4	21.3	119.3	106.4
Yankee	69.3	77.7	383.2	392.5
Total Group	4,242.4	4,051.4	19,534.0	19,284.8
*** % change 1982 vs. 1981	+1.9%		+0.7%	
Fashion & service				
Glamour	177.2	219.6	782.2	853.6
Harper's Bazaar	96.5	105.5	541.2	482.2
Mademoiselle	139.1	147.2	586.0	614.3
Vogue	204.5	191.5	1,056.1	918.1
Total Group	617.3	663.8	2,965.5	2,868.2
*** % change 1982 vs. 1981	−7.0%		+3.3%	
Art & antiques				
American Artist	93.0	73.8	306.9	291.1
Antiques	149.7	165.8	776.9	796.8
○Art & Antiques	50.9	58.1	166.3	172.5
▲Art in America	114.0	117.5	565.8	540.5
▲Art News	90.6	114.7	523.7	582.6
○Portfolio	62.0	44.5	189.8	128.0
Southwest Art	131.0	186.0	569.0	553.0
Total Group	691.2	760.4	3,098.4	3,064.5
*** % change 1982 vs. 1981	−9.1%		+1.1%	
Home				
§Architectural Digest	173.6	176.1	632.0	629.5
§Better Homes & Gardens	135.3	141.0	503.6	574.1
Colonial Homes	65.4	63.6	188.9	163.8
C.▲Country Living	34.0	30.2	174.6	69.3
Dallas-Fort Worth Home/Garden	52.3	37.5	247.3	166.7
Early American Life	—	—	72.3	81.6
§▲Family Handyman	81.4	62.3	357.0	281.9
○Flower & Garden	—	—	119.2	110.1
Home	26.6	40.0	136.7	155.8
†Homeowner's How-To	24.4	37.5	79.7	97.8
Houston Home/Garden	126.8	101.8	527.4	449.5
Horticulture	27.2	25.0	158.9	131.2
House Beautiful	98.3	115.8	393.0	450.6
House & Garden	116.6	126.9	460.7	529.4
Living:				
○Dallas	94.3	144.5	236.2	397.4
○Houston	78.6	104.2	247.4	286.2
○Denver	87.9	93.6	241.4	278.8
○Austin	—	—	80.8	97.9
○San Antonio	—	—	90.8	114.4
○Phoenix	—	—	72.9	71.4
○Florida Gulf Coast	—	—	52.8	46.9
○South Florida	—	—	77.8	9.8
Metropolitan Home	76.2	66.5	308.6	264.3
††New Shelter	37.5	38.8	192.8	197.4
1001 Home/-Decorating Ideas	30.6	29.6	140.8	131.6
Organic Gardening	61.2	66.5	388.6	400.2
Phoenix Home/Garden	54.1	40.0	252.0	159.4
San Diego Home/Garden	75.3	36.7	276.7	193.0
#Southern Accents	78.8	78.3	161.5	157.8
Southern Living	178.5	150.1	653.1	593.4
§Sunset Magazine	167.2	193.6	695.5	689.5
▲Texas Homes	75.8	63.9	375.5	331.4
○Workbench	58.7	56.3	190.2	190.7
Total Group	2,115.6	2,120.3	8,786.4	9,102.8
*** % change 1982 vs. 1981	−0.1%		−3.4%	
In-flight & other passenger				
#Aboard Group (7)	—	—	616.0	480.0
Air California	46.5	61.0	261.7	289.5
○Alas Group (9)	210.0	210.0	560.0	459.0
Alaskafest	40.4	38.9	193.7	176.5
American Way	84.3	63.4	328.3	283.7
East/West Network:				
Amtrak Express	44.8	35.0	190.0	157.7
Continental Extra	60.0	58.5	263.8	250.3
Eastern Review	85.2	87.2	394.0	391.6
Ozark	47.0	48.7	204.0	220.0
PSA Magazine	91.5	91.7	417.3	423.0
Republic Scene-East	55.5	60.3	241.8	233.2
Republic Scene West	57.3	65.3	257.0	277.5
Texas International/-The Texas Flyer	74.3	66.0	301.5	261.8
United	95.2	92.0	361.1	386.4
Halsey Publications:				
Braniff's Flying Colors	36.0	28.8	145.5	151.5
Delta Sky	54.8	41.0	248.3	227.0
○Skylite	14.5	11.0	32.3	21.8
Hawaii	15.7	26.0	112.8	143.8
○Pace	28.9	31.2	86.8	112.9
Pan Am Clipper	41.3	63.3	188.5	276.4
Southwest Airlines	126.3	92.0	466.3	374.3
Spirit of Aloha	15.6	25.7	112.8	147.4
USAir	43.4	54.4	201.1	217.5
Webb Publications:				
Frontier	41.8	38.5	196.1	169.3
Passages	32.5	30.3	151.8	134.3
TWA Ambassador	44.6	55.7	215.8	225.7
Total Group	1,487.4	1,475.9	6,748.3	6,492.1
*** % change 1982 vs. 1981	+0.7%		+3.9%	
Metropolitan				
○Aloha	29.0	24.3	85.5	67.3
Atlanta	75.9	101.0	327.9	404.5
Baltimore	67.0	72.6	288.6	302.3
Boston	135.7	141.2	582.2	580.6
California	83.1	68.0	335.1	281.5
Charlotte	22.0	—	90.0	—
Chicago	170.3	155.3	674.8	629.5
Chicago's North Shore	65.4	57.9	294.0	284.6
Cincinnati	60.3	57.8	271.9	251.6
Cleveland	70.8	90.1	277.6	374.5
Coast	423.0	419.5	1,131.1	1,081.7
Columbus Monthly	85.1	107.9	359.3	431.9
Commonwealth	77.8	10.3	357.7	57.8
Connecticut	72.9	72.5	367.4	329.1
Country Magazine	26.3	17.1	115.5	72.5
D/Magazine, Dallas/Fort Worth	124.0	122.4	515.7	535.7
Denver	41.3	55.4	194.7	240.6
Monthly Detroit	72.1	59.5	260.5	215.2
Exclusively Yours Wisconsin	66.8	70.2	350.0	405.4
Grand Rapids	33.4	34.8	197.8	187.9
††Gulfshore Life	52.5	50.0	402.5	350.0
Honolulu	63.3	76.1	316.1	338.3
Houston City	72.0	74.6	323.7	287.3
Indianapolis	83.7	63.4	300.6	242.5
Kansas City	37.7	18.7	125.2	88.9
Los Angeles	229.0	232.0	937.5	912.5
○Louisiana Life	58.2	20.3	163.1	37.3
Madison	47.0	42.0	231.7	212.0
Miami	89.2	70.6	456.0	401.9
Milwaukee	29.1	34.3	139.6	141.0
Mpls./St. Paul	64.8	71.0	350.8	372.9
Nashville!	38.3	69.0	197.9	352.8
New Jersey Monthly	56.5	74.6	256.5	322.4
Ohio	55.3	53.3	152.0	152.8
Omaha	21.2	24.2	96.9	80.1
Oregon	21.0	27.3	93.1	117.3
Orlando	71.7	78.5	350.0	360.3
▲Pacific Northwest	24.5	19.7	117.5	42.0
Palm Beach Life	41.0	46.3	500.0	484.3
Palm Springs Life	108.0	111.5	701.7	697.4
Philadelphia	126.3	141.7	590.6	664.5
Phoenix	73.5	84.5	413.0	435.8
Pittsburgh	46.3	46.3	217.4	188.9
St. Louis	76.5	68.5	321.8	339.7
San Diego	138.5	145.6	636.2	700.5
San Francisco	56.0	72.4	243.6	277.6
San Francisco Focus	47.5	42.8	183.4	177.6
†Shenandoah Valley	32.0	26.4	91.0	69.4
Tampa	33.6	31.5	166.5	132.0
Tampa Bay	—	—	164.3	199.8
Texas Monthly	165.9	152.3	610.9	623.5
Twin Cities	52.0	57.6	228.1	227.5
Washington Dossier	41.3	42.0	197.0	232.0
The Washingtonian	148.0	131.0	642.2	616.3
Westchester	50.5	37.0	159.1	172.3
Westchester Illustrated	39.5	34.0	185.4	168.8
Total Group	4,195.6	4,109.3	18,340.2	19,943.8
*** % change 1982 vs. 1981	+1.5%		−8.4%	
Movie-romance-radio-tv				
Ideal Women's Group:				
Daytime Stars	—	—	46.5	113.6
○Intimate Story	—	23.9	100.2	118.5
Soap Opera	—	23.1	46.5	113.6
Macfadden's Women's Group:				
Modern Romances	24.6	30.3	147.4	149.9
Secrets	24.6	30.3	147.4	149.9
True Confessions	24.6	30.3	147.4	149.7
True Experience	24.5	32.3	147.4	158.8
True Love	24.6	30.3	147.4	149.9
True Romance	24.6	30.3	147.4	149.9
Sterling Women's Group:				
Daytime TV	30.2	32.3	150.7	160.0
Modern Screen	32.5	—	99.8	99.7
○Movie Mirror	32.2	32.3	66.5	97.1
Photo Screen	32.2	—	64.5	66.5
Soap Opera Stars	25.3	25.0	101.2	154.2
TV Movie Screen	—	32.3	67.6	97.1
TV Picture Life	—	—	66.6	66.5
○Teen Bag	7.0	7.4	18.5	24.4
Total Group	306.9	360.1	1,713.0	2,019.5
*** % change 1982 vs. 1981	−13.7%		−15.1%	
Youth				
Boys' Life	19.2	24.7	95.7	108.7
Campus Life	24.7	20.0	230.3	201.3
Total Group	43.9	44.7	326.0	310.0
*** % change 1982 vs. 1981	−1.7%		+5.1%	
Mechanics & science				
§Mechanix Illustrated	68.8	80.9	348.5	380.4
Popular Electronics	59.2	57.6	297.6	299.1
Popular Mechanics	125.1	128.8	525.5	550.2
§Popular Science	99.6	87.9	436.3	417.4
Total Group	352.7	355.2	1,607.9	1,647.1
*** % change 1982 vs. 1981	−0.7%		−2.3%	
Boating & yachting				
Boating	105.0	138.5	621.5	641.2
Chesapeake Bay	29.9	28.3	130.2	129.3
Cruising World	134.2	120.4	642.2	599.5
Lakeland Boating	55.1	52.2	268.2	250.4
Motor Boating & Sailing	134.4	141.5	757.9	748.0
Rudder	20.2	21.4	120.1	113.0
Sail	155.1	152.8	814.5	762.5
Sea & Pacific Skipper	74.2	79.7	386.7	407.6
Trailer Boats	28.3	30.1	145.1	135.7
Yachting	165.3	191.9	955.4	1,001.0
Total Group	901.7	956.8	4,841.8	4,788.2
*** % change 1982 vs. 1981	−5.7%		+1.1%	
Automotive & recreational vehicles				
Car & Driver	90.0	106.8	386.5	424.7
Car Collector & Car Classics	19.3	25.4	106.3	109.6
Car Craft	86.3	86.6	361.6	314.9
Cycle	113.3	112.8	489.7	493.4
Cycle Guide	74.0	81.3	326.0	343.3
Cycle World	92.3	103.6	397.2	454.7
Dune Buggies & Hot VWs	56.7	39.8	252.0	194.2
Family Motor Coaching	99.0	63.3	479.9	300.1

*** % change figured ONLY from magazines with comparable issues 1982 AND 1981. §Sectional linage included but prorated to circulation of regional editions. *Sectional linage included but not prorated to circulation of regional editions. †Published 6 times a year. ○Published every other month. ▲Published 10 times a year. ††Published 9 times a year. ‡Published 3 times a year. #Published quarterly. ☆Published twice a month. ‡‡Published 7 times a year. ◊Published 11 times a year. ▼Published 8 times a year. **Published weekly. ▶Published every two weeks. A. Combined unduplicated regional ads. B. Preprinted inserts included. + Affiliated with Sunday Mag./Net. C. Monthly as of Feb. '82. D. Monthly as of Jan. '82. E. Corrected Jan.-March '82 total—387.8. F. Monthly as of Oct. '81.

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Advertising pages in May consumer publications

(Continued from Page 63)

	Pages			
	May 1982	May 1981	Jan.-May 1982	Jan.-May 1981
4 Wheel & Offroad	55.0	42.8	215.8	176.2
Four Wheeler	29.1	30.0	136.0	121.1
Hot Rod	88.1	75.7	306.1	289.0
Motorcyclist	81.5	80.6	328.5	319.8
††Motorhome Life	74.4	49.8	285.9	177.4
Motor Trend	63.5	71.0	306.1	289.0
Pickup, Van & 4 WD	34.3	—	129.0	113.9
Road & Track	96.0	113.5	430.4	457.9
◇3 Wheeling	21.9	27.0	93.9	86.8
Trailer Life	126.0	103.6	504.4	423.7
Total Group	1,300.7	1,213.6	5,535.3	5,089.7
*** % change 1982 vs. 1981	+4.3%		+8.7%	

Outdoor & sport

Alaska	53.1	40.2	235.7	189.5
○The American Handgunner	38.0	38.5	110.1	110.9
American Hunter	12.3	7.4	59.9	48.4
American Rifleman	34.3	27.5	131.4	132.6
○Backpacker	—	—	92.1	81.1
▼§Bass Master	68.9	62.5	331.7	224.2
††Bicycling	93.9	78.7	337.6	288.6
Field & Stream	96.0	97.4	419.3	427.5
§Fins and Feathers	43.1	43.1	221.9	174.9
○Fishing World	48.8	39.6	133.6	116.5
Florida Sportsman	72.2	72.1	383.0	373.5
Fur-Fish-Game	24.8	21.8	122.0	120.8
Guns	35.3	34.7	159.8	158.5
Guns & Ammo	49.0	87.7	219.1	235.6
Outdoor Life	85.3	73.3	355.5	383.2
Petersen's Hunting	33.4	28.6	140.1	119.2
The Runner	32.2	27.7	164.0	113.4
Runner's World	79.8	37.3	195.7	179.2
Salt Water Sportsman	73.8	77.5	339.6	348.7
Shooting Times	31.5	30.8	142.1	189.2
‡‡§Ski	—	—	222.4	196.1
‡‡Skiing	—	—	197.6	160.0
Skin Diver	63.4	57.9	320.0	282.0
‡‡Southern Outdoors	55.9	53.9	210.6	193.5
Sports Afield	88.3	86.1	481.6	436.0
▲Spray	48.2	—	183.2	138.6
▲Western Outdoors	41.2	41.7	181.5	172.4
Total Group	1,302.7	1,165.9	6,091.1	5,594.1
*** % change 1982 vs. 1981	+7.6%		+8.9%	

Comics

○Archie Comic Group	—	—	20.0	20.0
DC Comics	7.0	6.0	35.0	42.5
Harvey Comic Group	8.0	8.0	40.0	40.0
Marvel Comic Group	10.0	9.5	50.0	48.0
Total Group	25.0	23.5	145.0	150.5
*** % change 1982 vs. 1981	+2.0%		−3.6%	

Newspaper Sunday magazines/national

§Family Weekly	77.1	92.3	397.9	463.2
Parade	70.4	69.0	335.8	377.9
Total Group	147.5	161.3	733.7	841.1
*** % change 1982 vs. 1981	−8.5%		−12.7%	

Canadian national weekend magazines

B. Perspectives	48.6	48.7	184.3	203.2
§Today	54.3	59.4	217.4	275.3
Total Group	102.9	108.1	401.7	478.5
*** % change 1982 vs. 1981	−4.8%		−16.0%	

Canadian

L'Actualite	72.6	74.5	284.5	260.8
Chatelaine:				
§English Edition	111.1	120.0	434.0	416.1
French Edition	92.9	102.4	359.0	363.0
§Financial Post Magazine	54.4	58.0	197.3	217.9
§Flare	73.1	71.6	232.5	261.1
▲§Homemaker's Magazine:				
English Edition	89.7	83.9	347.8	335.2
French Edition	66.5	61.7	262.5	249.0
§Macleans	134.5	113.5	578.2	503.7
▼§Quest Magazine	62.8	53.1	191.4	167.0
§Reader's Digest:				
Canada-English	100.2	107.0	417.2	465.1
Canada-French	107.9	92.3	426.1	521.8
▲Toronto Live	141.0	108.0	514.0	439.0
Total Group	1,106.7	1,046.0	4,244.5	4,199.7
*** % change 1982 vs. 1981	+5.8%		+1.0%	

April

Business

Atlanta Business Chronicle	26.8	35.0	87.2	103.2
Barron's	196.8	189.0	703.3	725.3
Black Enterprise	32.4	33.2	160.4	162.1
§Business Week	384.0	401.5	1,409.7	1,448.1
California Business	75.0	45.0	240.0	189.0
Corporate Report/-Kansas City	57.9	57.0	194.5	187.6
Corporate Report/Minnesota	74.6	83.8	285.9	298.1
Crain's Chicago Business	90.4	86.3	365.6	309.5
Dallas/Fort Worth Business	40.2	43.0	170.1	144.6
Dun's Business Month	71.1	85.0	279.0	282.0
☆Financial World	72.6	72.9	305.3	302.8
Florida Trend	114.0	117.3	324.8	272.3
▶Forbes	264.7	219.4	889.2	814.1
▶§Fortune	212.2	208.4	692.7	626.8
Hawaii Business	56.1	54.6	166.6	201.4
Houston Business Journal	191.7	145.6	705.7	516.3
§Inc. Magazine	71.9	77.7	307.9	301.7
▶§Industry Week	125.5	152.9	471.6	522.8
Indianapolis Business Journal	66.7	55.0	258.9	196.5
§Nation's Business	41.4	53.1	154.6	173.0
*New England Business	70.3	50.0	248.0	151.7
St. Louis Business Journal	108.5	69.0	374.9	251.5
Texas Business	81.6	59.2	219.3	162.8
Venture	34.8	32.2	151.6	138.6
Total Group	2,561.3	2,442.7	9,176.1	8,482.4
*** % change 1982 vs. 1981	+4.8%		+8.1%	

Newspaper Sunday magazines/local

+Arizona Republic	117.5	127.7	396.1	488.4
+Boston Globe	186.4	76.4	623.4	593.7
+Chicago Tribune	89.5	110.6	349.2	440.6
+Cincinnati Enquirer	78.2	104.5	307.3	371.8
+Cleveland Plain Dealer	91.2	127.4	278.9	396.5
+Columbus Dispatch	55.8	97.9	227.1	355.7
+Dallas Times Herald	78.3	85.3	293.4	341.7
E. +Denver Post	—	—	—	—
+Detroit News	83.7	136.7	355.8	489.9
Los Angeles Times Home Magazine	105.2	138.7	354.2	442.2
+Miami Herald	68.9	103.2	269.9	348.8
+New York News	59.0	111.1	222.6	379.6
New York Times Magazine	379.9	441.7	1,398.8	1,421.3
+Philadelphia Inquirer	73.5	85.8	262.5	293.9
+Toledo Blade Magazine	35.8	66.1	179.1	233.2
+Washington Post	121.7	163.6	422.2	490.0
Total Group	1,624.6	2,107.7	5,940.5	7,087.3
*** % change 1982 vs. 1981	−22.9%		−16.1%	

Weeklies, bi-weeklies, semi-monthlies

The Advocate	82.6	68.1	256.5	242.2
§Army Times Military Group:				
Air Force Times	134.1	145.7	553.3	557.9
Army Times	134.7	145.7	544.6	553.2
Navy Times	155.1	167.5	651.6	641.8
The Times Magazine	28.9	33.9	68.9	79.2
AutoWeek	133.7	121.7	503.5	432.2
The Blood Horse	304.4	379.4	1,973.6	1,767.7
Capper's Weekly	22.9	17.1	111.3	114.0
Commonweal	10.0	8.5	77.9	30.6
Golf World	91.5	96.7	284.0	291.5
§Grit	28.6	22.5	106.6	105.8
National Review	36.0	29.5	109.8	104.8
New Republic	22.8	29.7	106.3	79.8
New York Magazine	219.1	205.6	713.5	647.2
New Yorker	387.2	388.6	1,275.4	1,225.3
§Newsweek	223.9	284.3	818.2	950.1
People	324.7	340.4	1,057.0	1,061.7
Rolling Stone	124.7	120.2	345.5	316.9
Sporting News	81.6	61.9	223.6	197.6
§Sports Illustrated	226.4	250.7	809.2	841.3
§Time	209.1	238.5	803.6	871.8
A. Travelhost	2,128.0	1,765.4	8,896.3	7,702.4
§TV Guide	292.3	267.2	1,265.1	1,273.6
▶Us Magazine	51.3	27.7	181.7	119.2
§U.S. News & World Report	145.2	143.0	528.6	525.2
Total Group	5,598.8	5,379.8	22,262.8	20,739.2
*** % change 1982 vs. 1981	+4.1%		+7.3%	

Foreign

Buenhogar:				
Ecuador	15.0	9.8	36.0	29.7
Chile	5.7	5.0	7.7	9.0
Mexico	83.5	92.8	225.7	224.5
Puerto Rico	26.7	37.7	70.7	76.7
Venezuela	55.0	62.3	141.7	140.2
Colombia	77.8	67.2	184.5	141.2
Peru	47.0	43.8	123.0	120.2
Central America	7.0	10.8	15.5	23.8
U.S.	6.7	6.8	22.0	29.0
Dominican Republic	15.8	15.3	57.8	41.0
Coqueta:				
Mexico	12.5	6.0	35.0	21.5
Puerto Rico	1.0	2.0	7.0	6.5
Venezuela	5.0	6.0	21.0	22.5
Colombia	2.5	4.0	18.5	13.5
Peru	—	—	5.0	—
Central America	—	—	5.0	1.0
Fascinacion:				
Mexico	4.0	12.0	23.7	27.0
Puerto Rico	1.0	3.0	6.5	5.0
Venezuela	9.5	7.5	41.2	36.5
Colombia	9.0	8.0	30.0	22.7
Central America	—	1.0	—	1.0
Geomundo:				
Chile	6.0	8.0	18.0	19.0
Mexico	15.0	16.0	40.0	40.0
Ecuador	5.0	7.0	16.0	13.0
Venezuela	16.5	13.5	52.5	40.5
Colombia	14.0	15.5	38.5	34.5
Peru	9.0	12.0	29.0	29.0
Puerto Rico	7.0	7.0	23.0	16.0
Central America	7.0	6.0	16.0	15.0
Hombre De Mundo:				
Mexico	26.7	20.5	61.2	49.5
Chile	5.2	6.0	19.2	20.0
Puerto Rico	5.7	11.0	23.7	38.0
Ecuador	4.0	6.0	17.0	19.0
Venezuela	30.2	19.0	74.3	54.0
Colombia	12.5	13.7	36.5	43.2
Peru	5.0	10.0	16.0	30.0
Central America	6.0	8.5	13.0	22.0
Ideas Para Su Hogar:				
Dominican Republic	—	3.5	3.0	10.5
Mexico	30.2	21.8	94.5	57.7
Chile	—	2.0	2.0	4.0
Puerto Rico	0.7	2.5	4.7	5.8
Ecuador	5.5	1.5	22.0	2.5
Venezuela	22.3	18.0	77.3	55.7
Colombia	26.0	21.5	70.0	58.3
Peru	12.5	11.0	38.0	31.0
Central America	1.0	2.5	5.0	3.0
Intimidades:				
Mexico	8.0	6.0	21.5	18.5
Puerto Rico	3.0	4.0	12.0	14.5
Venezuela	19.0	18.5	26.0	42.5
Colombia	1.0	1.0	7.0	8.5
Central America	1.0	1.0	7.0	5.0
Mecanica Popular:				
Mexico	27.2	25.8	83.8	91.8
Puerto Rico	15.8	23.3	56.5	76.8
Venezuela	26.7	26.5	93.7	96.3
Colombia	26.7	27.3	78.7	88.8
Peru	23.8	30.3	82.0	97.8
Central America	19.3	21.3	60.5	73.8
Chile	7.2	7.2	22.2	17.8
Argentina	9.5	11.8	31.3	45.2
The Ring en Espanol:				
Mexico	2.0	2.0	8.0	6.0
Puerto Rico	4.0	2.0	13.5	9.0
Venezuela	3.0	3.0	12.0	8.0
Colombia	—	—	—	—
Central America	—	—	—	—
U.S.	4.0	2.0	17.0	9.0
Vanidades Continental:				
Dominican Republic	39.8	31.5	124.3	89.2
Mexico	163.8	159.7	454.2	436.7
Chile	19.0	22.7	53.0	48.8
Puerto Rico	70.2	86.2	183.2	205.8
Venezuela	116.5	100.5	313.0	250.5
Colombia	113.7	108.0	234.8	240.7
Peru	59.3	56.2	151.7	142.3
Central America	28.2	36.8	86.5	88.5
Ecuador	28.3	40.8	67.8	80.0
U.S.	57.8	37.5	198.5	133.0
Cosmopolitan Foreign Editions:				
Australia	70.0	68.8	203.3	191.4
Brazil	46.0	43.0	128.6	103.9
France	150.7	143.7	337.3	308.3
Germany	33.0	14.0	84.0	45.0
Great Britain	119.0	129.0	331.0	334.0
Greece	80.0	50.0	198.0	135.0
Italy	69.8	76.2	193.4	196.5
Japan	47.0	38.0	134.6	73.0
Cosmopolitan en Espanol:				
Central America	4.2	9.2	14.8	22.3
Colombia	27.2	28.5	61.7	64.5
Ecuador	4.2	4.3	13.8	11.3
Mexico	92.5	68.7	247.7	119.3
Peru	28.7	22.8	59.7	52.5
Puerto Rico	28.8	36.8	95.2	104.8
U.S. (Spanish language)	17.7	16.5	65.7	56.0
Venezuela	34.3	35.3	112.7	85.2
International Communications:				
African Business	43.7	23.2	135.6	93.1
The Middle East	15.5	22.1	75.4	75.7
New African	17.7	25.1	95.5	111.5
Ak-Iktissad Al Arabi	11.2	11.0	24.8	37.3
International Management:				
Africa	17.7	17.2	58.8	48.8
Europe	38.0	44.3	131.5	140.5
Latin America	13.0	10.8	44.8	59.2
Middle East	15.0	13.3	67.8	54.7
Pacific	16.7	15.2	59.8	46.8
Johnston International:				
Alam Attijarat	63.7	58.5	235.0	223.9
Ejecutivo	25.2	—	38.8	—
Modern Africa	31.3	25.2	63.7	70.3
Modern Asia	44.1	50.0	117.6	139.5
§Newsweek International:				
Atlantic	96.6	104.1	296.7	304.3
Latin America	27.2	36.6	89.7	103.6
Pacific	62.4	75.2	249.9	263.3
††Progreso	—	17.6	—	51.6
Reader's Digest:				
Arabic	—	—	—	—
*Asian	165.5	231.5	750.5	543.4
Australian	76.5	70.0	264.5	344.3
Belgian-Flemish	116.5	99.5	295.5	281.0
Belgian-French	84.5	74.5	238.6	229.5
British	53.8	66.6	214.0	226.4
*Chinese	67.5	110.0	323.5	325.3
Danish	32.0	45.0	168.8	149.0
Dutch	64.5	68.8	160.3	179.4
Finnish	76.5	106.0	218.3	258.8
French	86.3	87.9	268.0	266.4
German	86.2	89.3	287.6	282.8
Iberian	29.0	49.5	105.0	152.0
Indian	99.5	109.0	346.5	421.0
Italian	69.0	72.5	185.5	263.5
Japanese	43.2	50.8	180.4	168.8
Korean	20.5	16.0	73.9	59.0
Latin America:				
Argentina	16.0	21.0	52.5	91.5
Brazil	16.3	11.5	42.8	41.1
Central America	13.5	18.0	46.5	57.5
Chile	13.5	23.5	60.0	105.5
Colombia	37.5	46.0	96.0	160.0
Ecuador	10.0	13.5	42.0	43.5
Mexico	57.0	49.7	186.6	198.0
Peru	12.0	11.0	36.5	41.0
Puerto Rico	11.5	9.5	33.0	30.0
U.P.B.	13.0	22.5	48.5	93.0
U.S. Spanish	17.5	28.0	69.0	75.5
Venezuela	20.0	20.5	73.0	77.5
Portugal	31.8	40.0	132.3	138.5
New Zealand	51.5	40.5	217.0	143.2
Norwegian	48.8	62.5	171.8	148.5
South African	114.0	100.5	334.0	285.5
Swedish	20.5	33.3	115.0	91.1
Swiss-French	34.0	43.0	111.0	120.0
Swiss-German	50.0	51.0	152.0	157.0
Canada-English	104.6	109.0	317.0	330.1
Canada-French	90.9	94.3	318.2	431.5
Time International:				
Time-Asia	89.4	96.7	306.0	325.7
Time-Atlantic	113.2	114.7	372.6	374.1
Time-Canada	173.5	183.8	588.2	541.0
Time-Latin America	63.6	74.4	223.3	229.6
Time-South Pacific	139.4	134.5	470.3	472.8
**Visao	155.3	103.7	428.7	357.0
▶§Vision/Latin America	34.2	41.1	120.6	126.8
Total Group	6,171.9	5,836.7	17,651.2	17,062.4
*** % change 1982 vs. 1981	+5.7%		+3.1%	